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# Letter from Robert Kennedy, Dean of the Ivey Business School

lvey is proud to be a founding member and PRME champion. These roles reflect our deepseated commitment to responsible leadership which has defined our business school for almost a century.

As Canada's first business school, first MBA and first PhD program, Ivey has a track record of first moves that respond to the forward-looking aspirations of real-world leaders.

Ivey has a distinctive teaching pedagogy that documents and celebrates best practices, dedicated research centers and institutes, and innovative programming that brings to the fore the cross-sectoral solutions organizations can offer to the grand challenges of our time from climate change to persistent poverty and inequality to the refugee crisis.

Our goal is to continuously champion what is possible for leaders, businesses and markets by helping the leaders we coach rethink the boundaries between business and society. Ivey students unlimit their potential, create positive social change, and actively model responsible approaches to future organizing.

Ivey's innovative approaches of integrating business and society continue to attract the best students, teachers and researchers. Responsible leadership is a shared goal and a mandatory part of every student's formation, and every single member of the Ivey faculty embraces at least one of the PRME goals in their research, teaching and service.

Since our last Sharing Information on Progress report on June 30, 2014, we launched dedicated research, teaching and outreach events on leadership character, welcomed Canada's first national research chair in sustainability, became our university's host for the Hult Case competition, established a global leadership position in health-care system transformation within Canada and enterprise-based solutions to global health, and scaled up case teaching, service learning and social innovation initiatives to the 39 countries per capita GDP of less than \$2,000 a year.

We also launched new student clubs in non-profit management and social enterprise, added social causes to each of the sections in our degree programs, action learning course components, and capstone volunteering events that enable our students to make a clear difference to our community, increased the range of internships and executive in residence initiatives that position our students at the forefront of current societal and environmental challenges, and celebrated the successful pitching and launching of multiple social enterprises by our HBA, MBA and EMBA students.

We have completed a programmatic redesign of our two flagship certificates in Entrepreneurship and Sustainability, which now offer SDG-focused case competition and curricula, including courses that challenge the dark sides of capitalism and promote social impact and social accounting.

We continue to host recurrent annual events including a Leadership Character and Candor conference that explicitly push our thinking and practice forward on the lines of the PRME principles.

While we take great pride in our already vibrant community of thought and action, our ambitions keep us looking ahead, searching for next opportunities to bring out the combination of character and competence that enable the leaders we form to become more responsible for our current grand challenges and more aptly champion our shared ambitions for a better common future.

Beyond Ivey, we play a global convener role through the Network of Business Sustainability and through our active membership in the Alliance for Research in Corporate Sustainability.

As a PRME champion, we are excited about charting new paths, synthesizing what we already

know works and exploring new methodologies and pedagogies for accelerating the integration of PRME principles in the formation of leaders in Canada and globally.

Warm regards, Robert Kennedy, Dean

"As the first Canadian business school to join the UN Global Compact, we fully subscribe to the ten Global Compact Principles, as well as the six **Principles of Responsible Management Education. Since joining, Ivey has** been actively involved with the United Nations Global Compact and looks forward to continued involvement in the years ahead."

## KFY ACCOMPLISHMENTS IN 2014-2016

**Internally:** The seventeen Sustainable Development Goals (SDGs) are being taught in all our core degree programs. Every single section/cohort partners with a specific social or environmental cause, actively fundraising and consulting for it throughout the program. Ivey students complete on average 3 different courses on responsible leadership courses before graduation. Since 2014, Ivey has featured a mandatory annual conference on Leadership Character and Candor. We became HULT hosts for the Western University in 2015, supporting six teams competing at the regionals since 2014. Our two degree certificates, in Entrepreneurship (since 2003) and Sustainability (since 2011), have been redesigned in the 2015-2016 academic year to explicitly prepare students to respond to the grand challenges of our times. In addition to the student-run club focused on sustainability (launched in 2012), we welcomed student-run clubs on social enterprise (launched in 2014) and non-profit management (launched in 2015). Each program hosts an annual IMPACT conference with keynote speakers, live cases, and hands-on activities promoting specific SDGs. Ivey students consult with over 100 organizations each year as part of their graduation requirements, and assist another 40-50 organizations through fast-turnaround quick-learning pro-bono projects.

**Externally:** Ivey leads the conversation on responsible leadership. In 2015 and 2016, Ivey's Ian O. Ihnatowycz Institute for Leadership convened global cross-sector conversations on research and best practice on measuring and building leadership character. We launched a Sustainability Showcase in 2014, and added a Sustainability Conference in 2016. Global communities such as the Network for Business Sustainability offer real-time reports of best practices, and work with leaders to identify next questions and set goals for sustainable development. Ivey is a founding member of the Alliance for Research on Corporate Sustainability (ARCS). Its contribution includes mentoring the next generation of sustainability scholars. Every fall since 2008 Ivey has welcomed 15 of the most promising researchers and 4-6 of the global thought-leaders pushing the frontier between business and society to more prosocial and more proenvironmental heights.

### FUTURE OBJECTIVES 2017-2018

**Internally,** Ivey has reached a sustainable configuration of certificates, case competitions and clubs that effectively bridge business, environment and society. The research institutes are encouraging a wide range of student-run events. Ivey Publishing will continue to maintain its world-first position in the creation and dissemination of cases documenting how organizations tackle grand challenges from mental health and education to poverty and corruption, around the world. We continue to raise the bar by developing new courses and areas of expertise. Ivey faculty Diane-Laure Arjaliès will be launching a new course on assessing the social and environmental impact of business, a world-first collection of cases that show leaders how to account for the carbon footprint and the social good they want to create. Ivey faculty Larry Plummer is preparing a social enterprise stream in Ivey's signature New Venture Creation Program, complete with resources from how to pitch social venture to dedicated case competition to prepare their launch. Ivey faculty Oana Branzei, Jean-Louis Schaan will scale up an earlier externally funded initiative documenting the impact of crises on business to explore how those displaced by cumulative adversity seek and find new homes elsewhere, complete with curricula, case repositories and practitioner- and policy- oriented briefs.

**Externally,** Ivey will continue the current forms of research, teaching and mentoring. In the next two years Ivey will also play a global leadership role in actively promoting the development of new theories of business that explicitly take into account social and environmental priorities. Ivey professors Oana Branzei and Simon Parker, both field editors for the #1 journal in entrepreneurship, the Journal of Business Venturing (JBV), will co-host world's first symposium on the theme on April 6-9, 2017 and assembling JBV's first special issue on the topic, titled "Enterprise Before and Beyond Benefit: A Transdisciplinary Research Agenda for Prosocial Organizing". Ivey faculty Tima Bansal, incoming co-editor for the leading journal in management, The Academy of Management Journal (AMJ), is also hosting an Ivey-based paper development workshop on June 2-3, 2017 for a forthcoming AMJ's Special Research Forum (SRF) on "New Ways of Seeing: Using Novel Theory and Meaningful Cross-disciplinary Collaborations to Advance Management Research." Ivey faculty Gerard Seijts and Mary Crossan continue to convene their global annual conference on Leader Character and Competence, convening the growing community of scholars championing responsible leadership practices within and across sectors.

## Overview

Since Ivey was founded in 1922, it graduated more than 25,000 degree alumni leading organizations in 105 countries. Approximately one in two Ivey alumni hold senior management positions within their companies. Ivey also prides itself in fostering both traditional and social entrepreneurs, with recent success stories including TenTree and Textbooks for Change.



26,835 degree alumni 27,868 degrees granted 2,962 alumni formally volunteer



Ivey operates two well-established Canadian campuses, the main one in London Ontario and an executive teaching facility located in downtown Toronto. Ivey also has numerous formal partnerships with educational and business institutions around the world, and is home to world's largest network of sustainability initiatives by and for business.

Ivey's mission is "to develop business leaders who think globally, act strategically, and contribute to the societies in which they operate." Leaders like Duncan Fulton.



Duncan Fulton is President of FGL Sports, responsible for the overall strategic direction and growth of the Company's more than 400 retail locations across Canada, including Sport Chek, Sports Experts, Atmosphere, National Sports, Pro Hockey Life, Hockey Experts and Intersport. Prior to this appointment, Duncan served as Senior Vice-President, Communications & Corporate Affairs, for Canadian Tire Corporation (CTC) and Chief Marketing Officer for FGL Sports and Mark's. Throughout his time at Canadian Tire, Duncan has been integral to the Company's focus on building its brand, becoming a new world retailer and establishing itself as the most innovative retailer in the world. In 2015, he was named Canada's Marketer of the Year by the Canadian Marketing Association. Duncan is also a board member for Own the Podium – a not-for-profit organization that prioritizes and determines investment strategies for national sport organizations in an effort to deliver more Olympic and Paralympic medals for Canada. Before joining CTC, Duncan was a communication advisor and press secretary for Canadian Prime Minister Jean Chrétien. Duncan was also Communications Director for the Minister responsible for the Canadian International Development Agency (CIDA), Press Secretary for Premier Dalton McGuinty and communication assistant for Premier Frank McKenna.

# The Ivey Pledge

Introduced in 2004, this pledge upholds a century-old expectation of being 'best in class'.

I \_\_\_\_\_, standing before my mentors and my peers, commit myself to venerate the traditions, reputation and integrity of the practice of business. I accept entry into an exclusive network of Ivey Business School Alumni. I acknowledge the responsibilities and value the benefits of being a member of such an association. I will, to the best of my ability, act honourably and ethically in all my dealings, in the belief and knowledge that doing so will lead to a greater good. I will express my ideas and opinions openly and without reservation, so long as they do not impinge on the rights and freedoms of others, whoever they may be. I will endeavour to act with moral clarity, grace and nobility. I understand that I am now a member of a distinguished community. I will strive to uphold the standing of the community, with



special obligation placed on encouraging and championing the pursuits of my fellow members. I will acknowledge my limitations and my mistakes so that I may learn from them. I will continue to seek new knowledge, never resting on past wisdom or successes. Above all, I will aspire to make a positive contribution to my society. I promise to uphold the traditions, integrity and high standards set by those Alumni that came before me. I promise this to myself, my family, my fellow Alumni and my School. I accept this Ivey pledge freely and upon my honor.

# Strengths

Ivey has grown global in its operations, outreach, and impact, and aspires to be one of the top 25 global schools. What sets Ivey apart – and we hope will keep us in the lead of the responsible management education movement globally – is a unique approach to teaching and research based on cross-disciplinary collaboration: the Cross-Enterprise Leadership™ model. Ivey Business School is also renowned for its "case method". Alongside Harvard, Ivey Business School is one of the two most important producers of business cases in the world. Ivey Business School is also home to Ivey Business Journal, a top Canadian publication of business thought leadership and management practice for more than 80 years.



Ivey's cross-enterprise focus, case study method, and Think-Act-Lead orientation equip students with the skills and resources needed to become decision makers and managers in the global economy. It is through these core principles and activities that we prepare all our students to proactively and responsibly engage social and environmental issues in all their decisions.

Our focus on cross-enterprise leadership helps to ensure that students recognize the breadth of issues pertinent to business decisions. From live-streamed debates on the refugee crises to designing and pitching business models in responsse as part of the most recent Hult case competition, cross-enterprise leadership encourages students to think about pressing issues in relationship to all functions in the firm, other firms in its network, government, society, and the environment.

Ivey students think holistically and proactively. The cross-enterprise case method helps them integrates all aspects of the triple bottom line in each and every decision, rather than focusing strictly on the fiscal bottom line. Ivey not only teaches them to think outside the financial box

but also enables them to look to the long-term. Through service learning, simulations, and interactions with real world problems our students incorporate social and environmental issues management beyond the Ivey classroom to explore globally-interconnected challenges.

# Thought Leadership

Ivey is also home to several prominent research centers and institutes that actively promote thought-leadership and practice in five specific areas of responsible management education.

### **Lawrence National Center for Policy Management**

Established: 2004

Number of Faculty Participants / Staff: 8

Web Address: https://www.ivey.uwo.ca/lawrencecentre/

Description: The Lawrence Centre is committed to the development of sound public policy by

improving collaboration between business and government.

#### International Business Institute

Established: 2016

Number of Faculty Participants / Staff: 23

Web Address: https://www.ivey.uwo.ca/internationalbusiness/

Description: Ivey's International Business Institute combines both the previous Asian Management Institute and Engaging Emerging Markets Research Centre (established in

2006), and includes international business issues in developed markets.

Network for Business Sustainability

### **Building Sustainable Value Research Center**

Established: 2006

Number of Faculty Participants / Staff: 24

Web Address: http://nbs.net/

Description: The Network connects researchers, teachers and practitioners to facilitate the creation and dissemination of evidence-based research in business sustainability (the simultaneous creation of economic, social and environmental value). The Center's mission is to provide practitioners and students with the knowledge, tools and capabilities to manage both private and public interests effectively through organizational actions, to

research organizational issues that simultaneously build private and public value across the enterprise, and to educate students and practitioners.

### Ian O. Ihnatowycz Institute for Leadership

Established: 2010

Number of Faculty Participants/ Staff: 32

Web Address: www.ivey.uwo.ca/research/leadership

Description: Developing leaders with a focus on character. Ivey's Ian O. Ihnatowycz Institute for Leadership is Canada's foremost leadership institute. Ivey has been developing business leaders for more than 85 years. Researchers at the Institute explore the essential competencies and character traits that add up to great leadership – the 'secret sauce' that inspires, energizes and creates value in organizations.

### **Ivey Energy Policy and Management Centre**

Established: 2011

Number of Faculty Participants / Staff: 10 Web Address: http://sites.ivey.ca/energy

Description: The Ivey Energy Policy and Management Centre is the forum for discovering and disseminating new knowledge about energy issues facing business, government, and civil society. Our aim is to provide thought-provoking knowledge that promotes innovative, responsible, and effective solutions to local, national, and global challenges.

### Ivey International Center for Health Innovation

Established: 2009

Number of Faculty Participants / Staff: 10

Web Address: https://www.ivey.uwo.ca/healthinnovation/

Description: The Centre aims to be a leader in the research, education and knowledge dissemination of value-based health care management. In 2009, the Federal Government, through Industry Canada, invested \$5 million into the creation of the Ivey International Centre for Health Innovation. Since our inception we have been an objective 3rd party academic centre working to take proven health sector innovations and implement them into the system using evidence-based methods. Core to the Centre's mission is brokering relationships that spur innovation and foster a collaborative process to ensure the successful implementation and sustainable adoption of innovative ideas, processes, models and technologies. The Centre is ideally situated to broker value-based innovation within the province of Ontario, Canada and abroad, and to lead a value-based, health care system transformation.

# Flagship Initiatives

#### Ivey PhD Sustainability Academy

Ivey plays a lead role in the formation of faculty that will champion PRME principles in their research, teaching and service. Ivey is a founding member of the Alliance for Research on Corporate Sustainability (ARCS). Since 2008, Ivey convenes, sponsors and hosts an annual global event where world's best faculty mentor 15 of the most ambitious doctoral students.



2016 Ivey PhD Sustainability Academy faculty and alumni.

A Best Paper award is presented by the Network for Businesss Sustainability. The winning paper is featured each year in the fall edition of the Network's newsletter, distributed to over 1,700 business sustainability researchers and students, and 2,800 business managers.

2015 Winner Juyoung Lee is a Ph.D. candidate in the Department of Sociology at Brown University. Her research interests lie in the intersection of urban, political, and organizational sociology. In her dissertation, she examines how the political economy shapes the distribution of toxic chemicals from industrial facilities across U.S. neighborhoods. In particular, one of her research questions concerns how the hierarchical and geographic restructuring of firm's business activities, in conjunction with neighborhood characteristics and state governments' environmental policies, shapes the environmental performance of polluting plants. Her dissertation research project has been awarded an NSF Doctoral Dissertation Improvement Grant in 2014.

#### Africa Service Learning & The Ubuntu Management Education Initiative

Managers are the engines of growth and establish the institutional mechanisms that create prosperity. Good managers go on to lead companies, NGO's, government departments and sometimes, nations. Managerial skill is what transforms the opportunities inherent in natural and human resources into vibrant economies via employment opportunities, company growth, investment returns and national competitiveness. Excellent managerial skill combines sound business knowledge with creativity, planning, ethics, critical thinking and analytical capability - skills which the AMI study of African employers suggests are currently under-developed in African business people.



Ivey and African Business students build business knowledge through case analysis and discussion. Ivey professor Nicole Haggerty, the founder of both initiatives, earned multiple awards.



The Ubuntu Management Education Initiative (U-ME-I) at Ivey began in 2012 as an elective course for Ivey students who enroll and participate in late April through May each year. It also involves African Business School undergraduate students who enrolled at their local institutions in a unique peer to peer course taught by these Ivey student instructors. Thus a unique form of peer to peer networking and management development is accomplished for both African and Ivey student participants. Concurrently the Faculty Director offers capacity building faculty development workshops to assist partner school faculty build this important capability. Finally each year we write 5-7 indigenous Africa business cases, developing a world class library of knowledge about the African business context.

#### New business cases create indigenous, real life scenarios for active learning

In partnership with faculty at universities in Africa, the initiative has produced an indigenous case collection:

Increasing Capacity at Sawdust Company Rwanda in collaboration with Murty Kopparthi 9B15M034, 8B15M034

Enhancing Competitive Strategy at Darling Kenya in collaboration with Pamela Odhiambo, 9B15A012, 8B15A012

Launching Ushahidi Globally 9B14E010, 8B14E010

Lilgaa Property Management Ltd's Expansion, in collaboration with Charles Lagat, 9B14M043, 8B14M043

Rwanda Backpackers 9B13A046, 8B13A046

Helio Polymer Enterprises Expansion Plans in Kenya, in collaboration with Pamela Odhiambo, 9B14D002.8B14D002

EA Financial in Ghana, in collaboration with Francis Ayensu, 9B14M042, 9B14M042

Scuby's Enterprise Ltd.: Starting a Business in Ghana, in collaboration with Francis Ayensu, 9B14M041, 8B14M041

Expansion at JKUAT Nakuru Campus, Kenya in collaboration with Pamela Odhiambo, Case # 9B13M021 and Teaching Note # 8B13M021.

Cool Pastures Dairy in Rift Valley, Kenya in collaboration with Pamela Odhiambo Case # 9B13M044, 9B13M045, 9B13M046 and Teaching Note #8B13M044.

Milango Microfinance, Kenya in collaboration with Fridha Theuri Case #9B13M052 and Teaching Note #8B13M052.

Bella Springs, Ghana in collaboration with Francis Ayensu Case # 9B13D009 and Teaching Note #8B13D009.



Everybody has their own preconceived notions about Africa. When I thought of Kenya, I always pictured elephants, giraffes, and a blazing sun over the savanna.

(May 24, 2016 blog entry, Rothschild Giraffe Sanctuary, Nairobi, Kenva)

#### **The 39 Country Initiative**

Business cases are one of the most powerful building blocks of management education. Ivey has taken a definitive step to make cases more accessible in the least developed countries around the world.



University faculty members in 39 countries with per capita GDP of less than \$2,000 a year can use all cases from Ivey Publishing's catalogue of more than 7,000 cases at no charge.

Addis Ababa University, Addis Ababa, Ethiopia. Shipment arrival date: January 27, 2014 **Ghana Institute of Management and Public Administration, Ghana.** Shipment arrival date: January 2, 2015

Moi University, Eldoret, Kenya. Shipment arrival date: October 16, 2015 Riara University, Nairobi, Kenya. Shipment arrival date: May 2016



**Professor Paul Beamish** launched this initiative in 2010. To date, 2000 professors have registered.

The 39 countries eligible to participate are: Afghanistan, Bangladesh, Benin, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Democratic Republic of the Congo, Cote d'Ivoire, Eritrea, Ethiopia, The Gambia, Ghana, Guinea, Guinea-Bissau, Haiti, Kenya, Liberia, Lesotho, Madagascar, Malawi, Mali, Mozambique, Myanmar, Nepal, Niger, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Somalia, Tajikistan, Tanzania, Togo, Uganda, Zambia and Zimbabwe.

At home, Ivey plays an active leadership role in the Africa institute. For example, Ivey professors Nicole Haggerty and Oana Branzei have facilitate campus-wide events and largescale collaborations among all the other faculties on campus on issues ranging from nutrition to HIV and mental health destigmatization.

#### The Refugee Crisis Initiative

Together with the Ivey MSc Association and Ivey CEMS student board, CEMS, Professors Andreas Schotter, the Ivey CEMS Progam Director, and Professor Oana Branzei are convening a conversation about the dilemmas and decisions confronting communities in-taking refugees, and the dimensions that business leaders need to consider as they make commitments in the short and long-term.

The event is meant to be highly interactive by providing students a forum to discuss a mayor critical issue openly in an international United Nations style format. Ivey students have the chance to exchange thoughts with foreign students from CEMS partner schools who will be represented by exchange students on campus and by live video conferencing and social media feeds online.

Special guest: We welcome representatives from the Mayor of London's special task force who will share their situation, challenges and potentially responses.

## **Ivey-CEMS Critical Global Thinker Series Tuesday September 29, 2015**

### What impact could or should leaders and business make?

- 1. Space: How are borders and jurisdictions being redefined by the (Syrian) Refugee Crises and what roles business plays in reshaping geography?
- 2. Time: How do the short-term problems and solutions amplify the economic, social, and humanitarian dimensions of the crisis in the long term?
- 3. Humanity: What categories are emerging to make sense of human suffering and organizational compassion, and what are the implications of these categories for organizations in the public and private sector going forward?
- 4. Response Scale and Scope: What is the range of local responses by leaders, how far/ how fast will locally customized responses diffuse, and at what gains/pains?



#### **AUDIENCES** (live streaming to nine partner schools)

HEC (France) WU (Austria) KOC (video) (Turkey) STOCKHOLM (video) (Sweden) BOCCONI (Italy) SAO PAOLO (Brazil) NHH (Norway) DUBLIN (Ireland) CORNIVUS (video) (Hungary)

#### How we can make a difference here and now?

Multimedia interactive reflection with CEMS partner schools, 15 minutes for each of the 4 dilemmas: Integrative retrospection and prospection on real-time business responses and emergent modes of organizing and communities with the London Mayor's Special Taskforce.

#### The Hult Initiative

A team of Western and Ivey students is heading to the regional finals of the 2017 Hult Prize Challenge, in hope of a \$1-million prize. Team TimeFund, including Western University Social Science student Victor Lal and Ivey HBA students Monique Tuin and Nandini Thogarapalli, won the campus-run quarter finals of the Hult Prize Competition held at Ivey on December 3, 2016.

Founded by philanthropist and former president Bill Clinton, the Hult Prize is the largest postsecondary social entrepreneurship competition in the world. It places student innovation on the global stage, challenging teams of up to four members to find solutions to the world's most pressing issues. The theme of the challenge is Reawakening the Human Potential. Students have to build sustainable, scalable startup enterprises that restore the rights and dignity of 10 million refugees by 2022.

The team's winning idea involved creating a system for refugees to exchange services using a unit of time as currency. This would not only allow refugees to exchange their banked "time coins" for other services, but also builds a record of work during their indeterminate state. The team will go on to compete in one of the regional finals in Boston; San Francisco; London, U.K.; Dubai; or Shanghai on March 3-4, 2017.



Western-run Hult Prize Quarter Finals, left to right: Destine Lee, HBA '17, London Mayor Matt Brown, Victor Lal, Monique Tuin, HBA '17, Nandini Thogarapalli, HBA '17, and Kevin Chang, HBA '17.

The solution was impressively simple, but nonetheless extremely effective and scalable: Provide an organized system to process aid (here, it was centralized to the mayor's office), and let what Brown calls "the Canadian value of compassion" speak for itself.

The Syrian refugee crisis has been felt by all of us here at Ivey and Western. With the arrival of the first refugee families in London last winter, calls for compassion, donations, and empathy have made their way into our campus community through social media and student philanthropy groups.

As London Mayor Matt Brown noted in his keynote address at the Hult Prize Quarter Finals, this type of community mobilization underlies London's success in refugee accommodation.

When he was only seven, Brown said he witnessed firsthand how communities and families can have a second chance. His church had sponsored a Vietnamese refugee family and his own family adopted two refugee teenagers. Brown said he grew up believing in the power of community action and shared humanity.

Fast forward 40 years to the Syrian refugee crisis. During a busy federal election, local governments from across Ontario decided to rally their community networks in support of Syrian refugees.

Brown recalls setting a goal to raise \$27,000 – enough to sponsor one family of four for a year – and watching something deeply moving and almost magical unfold. Within a few days of reaching out to community organizations, businesses, and citizens, his office had already surpassed its goal. Within a month, more than \$400,000 had been raised. Since then, London has welcomed 400 Syrian refugee families and has been recognized in Canada as a leader in the refugee effort.



The student-led Hult competition quarter finals came to Western for the first time in 2015, with financial and faculty support from the Ivey's Pierre L. Morrissette Institute for Entrepreneurship.

#### The Character and Candour Initiative

The day highlights the importance of character and candour – both in the students' day to day lives and as they take on leadership roles in their future careers. Character and candour are intimately connected and both are essential in great leadership, but in short supply. Building on research conducted at Ivey, the Institute has designed a day for students to experience first-hand what character is, why it is so critical, and how they can develop it. As part of the day, students will participate in workshops to understand their own personalized self-assessment of leader character and learn from the leadership of Nelson Mandela.

#### **January 21, 2015**

#### The 2015 event featured two speakers: Mark Messier and Yvonne Camus

Mary Crossan has designed an outstanding day for students to experience first-hand what character is, why it is so critical, and how they can develop it. Students will receive their own personalized selfassessment of leader character. They will experience the connection between character and candour in an innovative scripted role play involving 64 professional actors which will reveal how character flaws undermine candour and lead to ineffective decision making.

#### **February 9, 2016**

#### The 2016 event featured two speakers: Monica Lewinsky and Jeanne Beker

Monica Lewinsky is a social activist, Vanity Fair contributor, and ambassador as well as strategic advisor for Bystander Revolution. Bystander Revolution was founded to create a source of direct, peer-to-peer advice about practical things individuals can do to help defuse bullying. The ultimate goal of the organization is the discussion and spread of simple habits of leadership, kindness, and inclusion. Jeanne Beker is a multi-media fashion entrepreneur; host of fashion television for 27 years; style editor at The Shopping Channel; journalist; author; and a proud Canadian.

#### **February 7, 2017**

#### The 2017 conference features two speakers: Cheryl Pounder and Jaime Watt

Women's hockey champion Cheryl Pounder will speak about why learning from our successes, as well as our failures, is the key to staying on the path toward excellence, Cheryl will demonstrate that true achievement is found on the way to winning gold.

Jaime Watt, will deliver the keynote address, "Standing out from the crowd: How to successfully navigate your personal brand and reputation". He will speak about the importance of character and candour, particularly as students manage their personal and professional reputations. Navigator is

Canada's leading high-stakes public strategy and communications firm and Jaime is a trusted advisor to business leaders as well as political leaders at all three levels of government across Canada. Jaime has led ground-breaking election campaigns that have transformed politics because of their boldness and creativity.

# #1: Purpose

We will develop the capabilities of students to be future generators of sustainable value for business and society at large and to work for an inclusive and sustainable global economy.

Ivey students build purpose, on purpose: by acting purposefully in a variety of partnerships. Each EMBA cohort chooses a cause that they support from fund-raising through completion. Initiatives included Raising the Roof (\$21,000 raised by the 2016 Winter Cohort) and Plan International, "Because I Am a Girl" (\$14,210— and counting — by the 2017 Fall Cohort).



Ivey EMBA 2016 Winter fundraised \$21,000 for Raising the Roof, using bingo, 50/50 draws and a friendly hockey game with a competing program.

For six consecutive years (2012-2016), the HBA program has organized a Learning Through Action event. HBA1 Students leverages its business and leadership skills to raise money for the United Way Matched Education Savings Program by selling lemonade. 2016 was the final year of this particular challenge.



Ivey HBA students raised over \$30,000 in the first year for the Boys and Girls Club of London. The six-year event grand total was \$373,005. United Way believes that addressing the root causes of complex problems like poverty is the best way to create long-term, lasting change in people's lives and in our community. To address this issue, United Way developed the Matched Education Savings Program, which takes a two-pronged approach with outcomes for families and children that: 1) aims to break the cycle of poverty through education; and 2) provides financial literacy around saving for post-secondary education. The United Way has partnered with YMCA of Western Ontario and BMO Bank of Montreal to administer the program.

Students fan out across the city to raise as much money as possible within approximately 24 hours. Over 600 students were grouped across 80 teams. Every team received \$50 in seed money and a cardboard lemonade stand they put together themselves, along with a pitcher, a set of crayons, and a wooden spoon. The LemonAid challenge comes with a twist. Each team

will be given unique twists to their challenge. Such twists might include limiting locations where they can place their lemonade stand or their ability to speak to anyone that approaches their lemonade stand, price restrictions, being asked to sing only, having a mascot as part of their sell, and many more.

**Community Consulting Projects:** Ivey Community Consulting Groups helps local businesses (mainly NPOs) with building sustainable business models. The Community Consulting Project is a program that matches Ivey HBA student teams with local non-profit organizations to undertake pro-bono work developing business plans and other planning initiatives. The projects are completed over a six-week period with teams presenting their findings and report that outline specific recommendations addressing business issues.

**Community Internship Program:** The Ivey Connects Community Internship Program is designed to create greater awareness of how the community sector operates by giving students an opportunity to work over the summer for a not-for-profit organization in the Toronto or London regions. NPOs will gain strategic decision-making and implementation, and students will gain practical work experience. The program began in 2005.

**Ivey Connects:** Ivey Connects is a student-led organization working to inspire Ivey students to contribute to the societies in which they operate. Ivey Connects provides students with the opportunity to give their time through volunteerism, their treasure through fundraising, and their talent (management or otherwise) to those in need in the community.



lvey offers many well-structured and long-lived international student-run outreach programs.

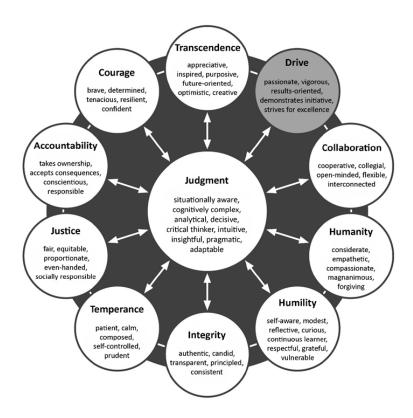
**The LEADER Project:** Ivey students take the case-study method to students of the former Soviet Union and Eastern Bloc countries along with Ghana, India, Haiti, Ethiopia, Kenya and Macedonia. Emphasis is on effective action-oriented business practices and decision- making in entrepreneurship. Students also perform business coaching around business plans.

**China Teaching Project:** The Ivey China Teaching Project offers a unique opportunity for MBA students to positively impact the future business leaders of China. A team of 12 volunteer teachers engages business students in China in case-based learning. It is in its 14th year of operation.

## #2: Values

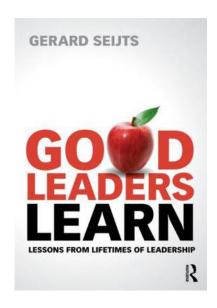
We will incorporate into our academic activities and curricula the values of global social responsibility as portrayed in international initiatives such as the United Nations Global Compact.

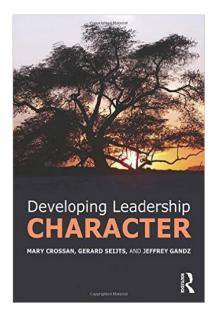
Ivey prepares students for the leadership dilemmas they will likely face, in three different ways: by helping them foresee ethical dilemmas, by helping them navigate crises, and by helping them proactively and productively engage with policy makers. Ivey students can choose among several electives such as transformational leadership, leading change, and strategic renewal. Ivey also introduced signature courses and conferences focused on leader character based on a proprietary framework co-developed by Ivey professors Mary Crossan, Gerard Seijts and Jeffrey Gandz.



Source: http://iveybusinessjournal.com/publication/developing-leadership-character

Ivey students benefit from home-grown frameworks of leadership character and competence.





This book focuses on the element of leadership that has largely been neglected in the literature: character. Often thought to be a subjective construct, the book demonstrates the concrete behaviors associated with different character dimensions in order to illustrate how these behaviors can be developed, and character strengthened.

The book begins by setting the context for the focus on character in business, asking what character is and whether it can be learned, developed, molded or changed. Next, the book focuses on each dimension of leadership character in turn, exploring its elements and the ways in which it can be applied in a business setting. The book concludes with a summary of the key insights, an exploration of the interactions between the character dimensions, and a call to the reader to reflect on how to develop one's own and others' leadership character.

Notable innovations in curriculum development include the 2015-2016 redesign of the Certificate in Entrepreneurship (2003-present) and the Certificate in Sustainability (2010-present), each graduating 20-40 students a year, and each offering a set of specialized courses and extracurricular activities. Both certificates were redesigned to include more SDGs in the curricular materials as well as extra-curricular activities.

Key design changes for the Entrepreneurship Certificate involve the addition of summer incubation for start-up ventures on campus (Western Propel) or in the community (Innovation Works) and summer internships with start-up ventures, including social ventures and Canadawide initiatives (Venture for Canada).



Social start-ups like Voguabond have become popular among Ivey students and alumni. The Voguabond team includes HBAs Alessandra Savoia, Marlie Goddard, Adrian Noronha, Erica Dixon, Amy Lin and Vanessa Townsend.

Voguabond has combined the team's passion for sustainability and fashion to create a unique solution that not only allows consumers to buy sustainable, unique fashion but also provides upcyclists the opportunity to turn their passion into a career. Voguabond is an upcyclemovement and marketplace that uses clothing swap events and a mobile platform to reduce clothing waste from people's closets and retailers' warehouses by creating new clothes from old ones. Fashion is the 2nd most polluting industry, with Canadian women aged 20-44 alone contributing to almost \$11 billion worth of wasted clothes.

Voguabond has already hosted three successful clothing swaps in Toronto and London, and there are calls for more from various clubs and organizations. Prior to a clothing swap, participants pay an admission fee and drop off their clothes for points that they can later trade for other clothes. The Clothing Swap includes local upcyclists who not only show off their work but can apply quick adjustments to clothes being traded. The leftover un-swapped clothes are given to the upcyclists and un-used points can be applied to future clothing swaps or online discounts. They have received interests from a number of social entrepreneurs who want to support the venture beyond the classroom.

### **Wearing Your Heart on Your Wrist**



Robyn Hochglaube, MBA '02, always wanted to change the world.

It's what took her to the jungles of Guyana at age 24, where she learned to read malaria statistics and collect blood swabs for research. But while Hochglaube was working in Kurukubaru - a village so remote that it doesn't register on Google Maps – she realized that, despite her noble intentions and worthy vocation, she could be making a greater impact somewhere else.

Since starting a West Coast adventure travel camp venture for 14-15 year old kids at the age of

19, Hochglaube has enjoyed working with youth. The opportunity to have an impact on young people as they discover who they are at a summer camp far outweighed anything Hochglaube could accomplish in the jungles of Guyana.

For the past 14 years, Hochglaube has run a number of successful youth camps. And while her latest venture, CitizenRad, is a departure from that mold, her focus hasn't shifted. A social enterprise centered on a fashion accessory, CitizenRad is looking to champion non-profits and young philanthropists while providing young people an avenue to express their support of ideas and causes.

Launched this past February, Hochglaube describes CitizenRad as 'Pandora for young and athletic people,' but with a strong social impact component. The silicone, and soon to be released distressed leather, bracelets come in youth and adult sizes and carry a host of tags (called RaDTaGZ) that can be used to customize the bracelet. The social impact side is the real driving force behind CitizenRad, according to Hochglaube. She wants her brand to highlight and support young philanthropists and small to medium size charities.

"There's always money for startups that are for-profit but all these small startup charities out there with incredible sustainable ideas don't have anywhere to go," said Hochglaube. With CitizenRad, she hopes to create a community where philanthropists can talk about what they are doing and build financial support to accomplish their goals. A large part of that initiative will be accomplished through CitizenRad's 'For the Love of Good' collections where 100 per cent of all proceeds originating from purchases of these custom designs goes to the organization that created them. CitizenRad will boost that amount with \$1 from any bracelet sold along with those tagz.

With endless possibilities to personalize and brand both bracelets and tags, Hochglaube sees potential for CitizenRad to work with any group wanting to be a more permanent part of a supporter's personal brand; especially those who want to connect with the up and coming Millennial and Generation Z givers. There are also opportunities with corporations with CitizenRad becoming a connector of youth and corporate initiatives. According to Hochglaube, the next generation of givers want to support causes, not institutions, and there is a real opportunity for CitizenRad to help bridge that gap. The revamped e-commerce site is set to launch in late October and will host collections from PancreaticCancer Canada, the L.O.V.E.

Project and Coat A Kid before the end of the year. Hochglaube hopes to grow that number to at least twelve collections in 2017 along with an app that will drive the community building component of CitizenRad.

Taking risks comes naturally to Hochglaube. "I honestly believe it is nature. You are the type of person who enjoys risk and is willing to work all hours. You put your heart and soul into something because that's just who you are." Hochglaube stressed that no one chooses to go into the social enterprise or non-profit space because it's glamourous, but because it's part and parcel of who people are. With the rising popularity of various social impact models, Hochglaube has a two-part process for students to consider if they feel it is their calling.

"Ask yourself, what do I think is wrong with this world and what am I going to do about it?" For Hochglaube, her calling has always revolved around youth. "They see things from a different perspective than us jaded adults and it's really unfortunate that they are not given enough attention by corporations and organizations who can really benefit by bringing them into the fold," said Hochglaube.

That is the space CitizenRad is planning to occupy in becoming a platform where young people can inspire each other, collaborate and build financial support to create real change. For Hochglaube, it's about empowering future generations, not just giving them a "good for you" pat on the back. Furthermore, Hochglaube is also planning to help deliver trend-setting marketing strategies for corporate brands that want to create authentic and meaningful connections with youth.

Coming from a nonprofit background and having only worked for herself, Hochglaube found lvey a steep learning curve and recalls wondering if someone at admissions had made a mistake. After a month, she settled into the program and changed her focus from grades to building community and learning. "I'm here and I'm not going to give up. I'm going to have a lot to give and I'm going get a lot from Ivey," she said. During her two years at Ivey, Hochglaube was voted "most outstanding contribution to the class" and helped start MBA Laundry (an entertaining end of year review show on the class' Ivey experience).

"To me he embodies the drive of an entrepreneur, because of all the things he has been able to share with me," says Hochglaube, who is glad to have the support of those who have gone before her and succeeded as entrepreneurs.



**Tony Bouk, MBA '05,** enjoys solving problems—and with his company GreenBug Energy, he's doing just that through ancient technology. "People like me around when there's a real problem to solve, but after that they just view me as a pain in the neck. I don't leave things alone—I'm like a pit bull with a problem," said Bouk. GreenBug Energy designs, manufactures, installs, operates and maintains Archimedes screw generators for small dams, creating micro hydro-electric sites that can produce 1-to-500 kilowatts of energy. Apart from being profitable, the projects are designed to reduce greenhouse gases and lessen disruption on underwater inhabitants.

Key changes in the Sustainability Certificate include the development and launch of a mandatory core course preparing students to assess, and manage, both the negative and the positive impact their organizations may have on the environment and society.



Ivey Assistant Professor in General Management, Managerial Accounting and Control and Sustainability, Diane-Laure **Arjaliès**, explains that "assessing the impact of organizations on society has become of major importance in today's capitalism. Central to this development are the growing requests made by investors, employees and consumers to measure the social and environmental performance of companies, public organizations, States, NGOs and products, among others. This course will unravel why such requirements have appeared and why they will keep increasing in the future." The new mandatory Sustainability Certificate course will also provide students with the knowledge and tools they will need to address such demands in their career.

The first half of Professor Arjaliès explores the different ways of assessing the social and environmental impact of organizations and products across industries and countries. It details the different standards in-use, their pros and their cons, as well as critically reflect on the consequences of such evaluations. The second half of the course enables each student to apply this knowledge on a real case study by assessing the social and environmental impact of an organization, venture or product. Depending on the professional aspirations of students,

they will be offered to work on existing companies or products or on their own venture projects.

By the end of the course, students will be able to:

- Critically reflect on the role of accounting in society and how it might contribute to the transformation of business towards sustainability.
- Understand why an increasing number of investors and stakeholders are asking organizations to account for their impacts on society.
- Know the processes through which the social and environmental impact of different forms of businesses could be assessed.

The **Sustainability Certificate** is a degree program that aims to prepare students to create, lead and grow sustainable brands and organizations that voluntarily commit to the implementation of the UN Global Compact's 10 principles of human rights, labour, the environment and anti-corruption and/or champion the 2030 Agenda for Sustainable Development, by adopting the 17 Sustainable Development Goals (SDGs) to end poverty, fight inequality and injustice, and tackle climate change.

The Certificate in Sustainability provides students with a coordinated set of courses and experiences that best position them as responsible, forward-looking leaders by providing personal mentorship from morally exemplary CEOs, engaging them in real-time, world-leading practices of sustainability reporting and consulting, and equipping them with best-in-class capabilities to evaluate, communicate, design, and deliver sustainability-focused interventions and innovations in organizations of different types and sizes, within and across sectors.

### This certificate serves three types of students:

Students committed to making business a significant force for good in the world Students motivated to identify and implement socially-transformative business models Students aiming for board or leadership positions in the non-profit sector or in the government

Sustainability Certificate students complete three mandatory courses (on Corporations & Society, Giving Voice to Leadership, and impact assessment) and choose two more electives that allow them to further specialize in communication, innovation or public service/policy.

4580 Reputation Management 4402 Communications and Society 4458 Leading Change

4564 Design-Driven Innovation

4579 The Dark Side of Capitalism? Pirates, Mavericks, and Industrial Renewal

4609 Public Policy Analysis

4525 International Business Environment Studies: Service Learning in Africa

Sustainability has been a mandatory elective in our HBA program since 2007. It is a required course in the Ivey EMBA, where we have been teaching it as a standalone course since 2010. Topics include the financial crises, the origins and evolution of the corporation, climate change, energy, sustainable supply chains, social enterprise and social innovation. Since 2011, Sustainability is also offered as an elective in the Ivey MBA program and in the Ivey MSc program. Sustainability-minded students collaborate across programs, coming together in several student-run clubs (Sustainability, Non-profit Management, and Social Enterprise) and coorganizing events featuring different levels and levers of impact.

At the graduate level, Ivey offers a joint degree opportunity in conjunction with the CEMS Global Alliance. The joint Ivey MSc / CEMS Master of International Management challenges its students to think both broadly and deeply about complex business issues and environments. Explore real life international business challenges using the business case studies and case learning methods that put Ivey on the map. The Program is designed to demonstrate how students can dig deeper to understand how research can be applied to complex global management issues and discover new research opportunities that may still exit. The goal of the Ivey MSc/CEMS MIM is to develop students' capacity to think critically and creatively, make informed decisions, and to interact and lead effectively in an international environment through experiential learning: international exchanges, consultancy-based international business projects, internships, interactive teaching methods, and skills seminars.

Founded in 1988, CEMS is a strategic alliance of 27 member schools covering 4 continents and 56 multinational corporate partners. The CEMS Master of International Management (MIM) Program provides a unique blend of education and professional experience for multilingual, multicultural postgraduate students. This designation is exclusively open to the MSc students of CEMS schools and is awarded in conjunction with their home MSc degree.



Ivey's MSc Program was selected as the first North American and the exclusive Canadian partner school to join the prestigious CEMS international management education alliance.

Ivey's PhD program incubate innovative and impactful research. Since the end of our latest reporting period (June 30, 2014), 31 doctoral students have defended proposals or theses on topics related to PRME. Ivey was also home 12 post-doctoral students.



Special congratulations to 2016 Ivey PhD program alumnus Mark **Desjardine**, who received the Governor General's Gold Medal for his three-essay thesis examining the causes and consequences of short-term thinking in business organizations. Mark also won:

- 2015 People's Choice Award.
- 2015 Sumantra Ghoshal Research and Practice Award, BPS Division.
- 2013 Best Paper Award.

Last Name	Placement at Time of Completion	Supervisor(s)	Dissertation Title
Wong, Matthew	Postdoc - Ivey	Morse, E.	Entrepreneurial Culture: Developing a Theoretical Construct and its Measurement
Jung, Jason	Korea Air Force Academy	Konrad, M.	Research on appraisals and reactions of voice recipients to assertive (vs. tentative) employee voice
Whelan, Jodie	York University	Thomson, M.	A Cognitive Role Theoretic Approach to the Consumer Role
Lopez Jimenez, Liliana	Universidad Externado de Colombia	Haggerty, N.	Small Business Encounters with Information Technology
Elias, Rida	American Uni of Beirut	White, R.	Learning during the transition period: How identifying executives as designate CEOs affects their learning
Farah, Bassam	American Uni of Beirut	Beamish, P.	Multinational Enterprise Parent- Foreign Subsidiary Governance
Hossein Nejad, Mehdi	University of Ontario Institute of Technology	Rowe, G.	Attention to Competition: The Role of Managerial Cognition in Shaping the Response to Competitive Actions
Raz, Maziar	Peter Lougheed Leadership Institute At The Banff Centre	Frost, T.	Frontstage Dramaturgy, Backstage Drama: An Ethnographic Study of the Provision of Hotel Accommodation
Barrett, David	Ivey Business School	Menor, L.	An Empirical Investigation of the Influence of Preparation and Implementation Capabilities on Lean Management Competence
Sartor, Michael	Queen's University	Beamish, P.	Essays on the relationship between host market corruption and multinational enterprise strategy

Last Name	Placement at Time of Completion	Supervisor(s)	Dissertation Title
Plourde, Yves	HEC Montreal	Schaan, J-L	Engaging With The Future: A Historical Investigation Of Greenpeace
Eghbali-Zarch, Majid	Memorial University of Newfoundland	Beamish, P.	Stability and Change in the Strategic Decisions of Multinational Enterprise
Bagga, Charan	Freeman School of Business, Tulane University	Dawar, N.	The Viability and Sustainability of a Trivial Attribute Differentiation Strategy
Hajmohammad, Sara	Asper School of Business, University of Manitoba	Vachon, S.	Three Essays on Sustainable Operations Management
Zhang, Min (Megan)	UCD School of Business University College Dublin	Beamish, P.	MNE Ownership, Subsidiary Performance, and Economic Liberalization
Shafiq, Asad	California State University, Fullerton (CSUF)	Johnson, F.	Supplier social engagement, reciprocity of social practices and performance in supply chains
Schnarr, Karin	School of Business and Economics at Wilfrid Laurier University	Rowe, G.	The Impact of Sarbanes-Oxley Changes and Board Independence Power on Selected Governance Practices at the Board Level
Woodwark, Meredith	Wilfrid Laurier University	Seijts, J.	Working Harder, Working Smarter, or Doing Both? How the Interpretation of Combined Learning and Performance Goals Affects Complex Task Performance
Jeffrey, Jennifer	King's University College, UWO	Thomson, M	Parsing the Parasocial: Examining How Reference Groups, Affiliation Motives, and Biological Sex Predict Endorser Effectiveness
Liaw, Chya-Yi	City University of Hong Kong	Chen, S-F	A Principal-Agent View on International Hotel Branding and Empirical Evidence from China
Hassanmirzaei, Foad	Leavey School of Business at Santa Clara University	F. Odegaard, S. Yan	Three Essays on Managing Customer- Based Strategies: A Pricing and Revenue Management Approach

Last Name	Placement at Time of Completion	Supervisor(s)	Dissertation Title
DesJardine, Mark	HEC Paris	T. Bansal	The Causes and Consequences of Corporate Short-termism
Srikant, Chethan	Mihaylo College of Business and Economics, California State University, Fullerton (CSUF)	JP Vergne	Social Barriers to Entry: Liquefied Natural Gas Import Terminals in the US from 2000 to 2013
Dang, Chongyu	N/A	S. Foerster, F. Li	Three Essays in Empirical Finance and Corporate Governance
Wang, Juan	Faculty of Business & IT, University of Ontario Institute of Technology (UOIT)	M. Goode, J. Cotte	Designing A Hybrid Experience: The Effect of Experience Structure on Consumers' Evaluations
Nastasoiu, Alina	DeGroote Business School, at McMaster University	M. Vandenbosch	Evaluating Loyalty Programs with Endogenous Redemption
Shulist, Patrick	Postdoc - Schulich School of Business, York University	O. Branzei	"My friends, they are people to rely on:" The social foundation of business in Ghana
Shin, DJ	University of Lethbridge	A. Konrad	Human Resource Management Practices and Performance: A General Systems Perspective
Hu, Yanfei	Faculty of Arts and Social Sciences, University of Surrey	C. Rerup	Social Movement Organization and Robust Action: Creating a Pre- movement in a Movement-inhibiting Environment
Hasse, Vanessa	University of San Francisco	P. Beamish	Responses to Subpar Performance in Foreign Subsidiaries
Pettit, Krista	Postdoc - University of Liverpool	M. Crossan	An Exploration of the Relationship Between Strategic Renewal and Occupational Identity

## #3: Method

We will create educational frameworks, materials, processes and environments that enable effective learning experiences for responsible leadership.

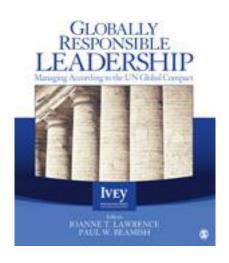
Ivey Publishing is the world's second largest producer and distributor of comprehensive, decision-oriented business case studies. It markets cases produced by Ivey faculty as well as those from individual professors at other institutions. The latter go through a review process.

Several Ivey Publishing cases have been globally recognized with prestigious awards:

Outstanding	Apple Inc: Managing a	Johnson, P.F., Mark, K	The Case Centre
Contribution to	Global Supply Chain; This		Awards and
the Case Method	award honors individuals		Competitions 2016
in the Catagory	who have demonstrated		
of Production	thought leadership and made		
and Operations	extraordinary contributions to		
Management	the advancement of Purchasing		
	and Supply Management as a		
	scholarly discipline.		
First Place	The Nescafe Plan;	Klassen, R.D.,	John Molson Case
		Chandrasekhar, R	Writing Competition
Second Place	Osklen: The Aesthetics of Social	Branzei, O	Emerald's CEEMAN
	Change;		Case Writing
			Competition 2015
Corporate Social	WWF's Living Planet @ Work:	Branzei, O., Lin, H.,	EFMD Case Writing
Responsibility Case	Championed by HP;	Chakravarty, D	Competition
Award			
<b>Emerging Chinese</b>	Yancoal: The Saskatchewan	Peng, G., Beamish,	EFMD Case Writing
<b>Global Competitors</b>	Potash Question;	P.W	Competition
Case Award			

As an early signatory to the Global Compact (GC) and the Principles for Responsible Management Education (PRME), a GC-supported initiative, an immediate question Ivey faced was how the School might further the Global Compact principles, both internally but especially externally. The most obvious beginning was to leverage the Ivey Publishing case collection. The first action taken by Professor Paul Beamish was to determine how many of the cases in the overall collection could be matched to the Global Compact's 10 principles. By mid-December 2011, there were already over 250 relevant cases in the collection. The next action was to make it easy to locate the cases, by category. The 10 Global Compact principles are organized under four main categories. The categories can be found on the Ivey Publishing website (https:// www.iveycases.com/) by clicking on Browse Catalogue (upper left) and then scrolling down to Cases By Theme to "Global Compact Initiative Themes" (subcategories = Anti-Corruption Practices (58, 11 added), Environmental Sustainability (191, 86 added), Human Rights (64, 6 added), Labour Standards (68, 13 added). A sampling of abstracts from some recent case studies published in these four areas is shown in Appendix A.

Recognizing that a very large number of business professors worldwide prefer or are required by their institutions to use textbooks rather than compilations of cases and readings, the next step was to try and publish a Global Compact-focused case and textbook. The book is organized according to the 10 Principles of the Global Compact. It is intended to serve as the basis for a stand-alone course in business schools.



Ivey Professor Paul Beamish and Hult Professor Joanne Lawrence co-edited a casebook and textbook which was first commercially published in March 2012 as part of the Ivey-Sage series.

The 550 page softcover book is entitled "Globally Responsible Leadership: Managing According to the UN Global Compact." It is made up of eight chapters and 21 lvey case studies. All of the case studies have full teaching notes available at no cost to qualified faculty via Ivey Publishing.

The eight invited chapters were contributed by faculty members from around the world. A Foreword to the book was provided by the Executive Director of the UN Global Compact.

## #4: Research

We will engage in conceptual and empirical research that advances our understanding about the role, dynamics, and impact of corporations in the creation of sustainable social, environmental and economic value.

Ivey encourages cutting edge research through a multi-pronged approach including research centers and institutes, brownbag and speaker series, and access to internal and external funding for high-impact research. By December 2016, Ivey employed 113 faculty members. Research-active faculty published 93 articles in 2016 and 76 in 2015; 48 articles are forthcoming in 2017. Collectively they received 28 major awards in 2016 and 37 the year prior.

In the 2014-2016 reporting period Ivey faculty have applied and received over CAN\$8 million from large public and private funding agencies for pioneering new research. Ivey is also home to two Canada chairs, valued at CAN\$1,400,000 each: Professor Paul Beamish in International Business and Professor Tima Bansal in Sustainability.



In 2016, Tima Bansal was awarded a partnership grant from SSHRC for \$2.5 million over seven years. The award will fund research on business-driven innovations for sustainable development and will be hosted by the Centre for Building Sustainable Value and mobilized through the Network for Business Sustainability. The research will help businesses develop solutions to organizational challenges that create value for business and society. These solutions will come in the form of new knowledge, innovative new products, processes, and business models. Overall, this research will help establish Canadian businesses as leaders of innovation for sustainability, helping them to contribute to Canada's productivity and prosperity.

Research funded by large research grants has played an instrumental role in raising the bar across Canada by modeling the impact that publicly funded research can have in influencing policy and practice. For example, Canada Research Chair in Sustainability Tima Bansal received the 2015 Sage Best Paper Award, Organizations and Environment for her paper titled "The Time and Space of Materiality" and published with co-author J.K. Hayes in Organizations and the Natural Environment. She also received the best paper award on Environmental and Social Practices from the OMT Division in 2015 for a paper coauthored with A.K. Kim and Helen Haugh titled "Tea Time: Temporal Coordination for Sustainable Development".

Ivey faculty Oana Branzei received an \$164,503 SSHRC Insight Grant titled "Hopes and Dreams: Biopsychosocial Processes of Positive Change and Social Innovation through Enterprise, Entrepreneurial Selves and Entrepreneuring Rituals" which studies how the next generation engages in the traditional and the sharing economies in ways that seek and make a positive difference to society. With her colleague Jean-Louis Schaan and doctoral fellow Ramzi Fathallah, Professor Branzei also holds a second SSHRC Insight Grant of \$191,850 which focuses on cumulative adversity like the global refugee crises or recurrent shocks such as natural and man-made disasters.

#### Mary Crossan was the first business professor to earn Western's life-time award distinction and become a Distinguished University Professor.



In 2015, Mary Crossan received the Distinguished University Professor (DUP) Lifetime Award of \$10,000 per year. This award is Western's highest honour recognizing excellence in teaching, research and service over a substantial career at Western.

Mary Crossan pioneered the study of leadership character:

Crossan, M.M., Byrne, A., Seijts, G.H., Reno, M., Monzani, L.M., Gandz, J., (forthcoming), "Toward a framework of leader character in organizations", Journal of Management Studies.

Seijts, G.H., Gandz, J., Crossan, M.M., Reno, M., 2015, "Character matters: Character dimensions' impact on leader performance and outcomes", Organizational Dynamics, January-March 44(1): 65 - 74.



In the 2014-2016 reporting period Ivey Assistant **Professor Caroline Flammer** published five papers in the leading management journals. Most articles received multiple awards at global conferences. Professor Flammer's contributions to research were also recognized by three major external awards in 2015: the ARCS Sustainability Scholar Award; the Best Published Paper in Finance and Sustainability; and FIRPRI Award 2015. The same year Professor Flammer also received the Ivey Emerging Leaders Award.

Flammer C, Bansal P. Does a Long-Term Orientation Create Value? Evidence from a Regression Discontinuity, **Strategic Management Journal**, forthcoming.

Winner of the 2016 Investor Responsibility Research Center (IRRC) Institute Research Award (press release).

Honorable Mention 2016 Moskowitz Prize for Best Paper in Socially Responsible Investing (press release).

Featured in the Wall Street Journal (news article).

Featured in Alex Edmans' blog on Executive Compensation Policy Reform (blog).

Video abstract published by Strategic Management Society (video abstract).

Flammer C, Luo J. 2017. Corporate Social Responsibility as an Employee Governance Tool: Evidence from a Quasi-Experiment, Strategic Management Journal, 38(2): 163-183.

Strategic Management Journal lead article February 2017.

Flammer C, Kacperczyk AJ. 2016. The Impact of Stakeholder Orientation on Innovation: Evidence from a Natural Experiment, *Management Science*, 62(7): 1982-2001.

Winner of the 2014 Glueck Best Paper Award of the BPS Division of the Academy of Management. Selected for Best Paper Proceedings, Academy of Management, BPS Division (2014).

Flammer C. 2015. Does Corporate Social Responsibility Lead to Superior Financial Performance? A Regression Discontinuity Approach, *Management Science*, 61(11): 2549-2568.

Winner of the 2013 Moskowitz Prize for Best Paper in Socially Responsible Investing (press release). Winner of the 2015 FIR-PRI Award for Best Published Paper in Finance and Sustainability (press release).

Honorable Mention 2016 ONE-NBS Research Impact on Practice Award.

Management Science lead article November 2015.

Featured on Strategic Management Society Research Chatter as "cutting edge work on CSR", February 2016 (podcast).

Flammer C. 2015. Does Product Market Competition Foster Corporate Social Responsibility? Evidence from Trade Liberalization, **Strategic Management Journal**, 36(10): 1469-1485.

Inaugural video abstract published by Strategic Management Society (video abstract). Selected for Best Paper Proceedings, Academy of Management, BPS Division (2013).

Ivey faculty members consistently publish research related in the top tier journals in different fields (Appendix B).

Key contributions in thought leadership include: work on time and temporalities in organizations, work on complex and wicked problems and cross-sector solutions, work on categories (especially in controversial or contested industries) and work on non-market strategies including political involvement by organizations.



Fremeth, A., Holburn, G.L.F., Vanden Bergh, R., 2016, "Corporate Political Strategy in Contested Regulatory Environments", Strategy Science, December 1(4): 272 - 284.

Fremeth, A., Marcus, A.A., 2016, "The Role of Governance Systems and Rules in Wind Energy Development: Evidence from Minnesota and Texas", Business and Politics, October 18(3): 337 - 365.

Fremeth, A., Richter, B.K., Schaufele, B., 2016, "Motivations for Corporate Political Activity", Advances in Strategic Management, May 34: 161 - 191.



Fremeth, A., Holburn, G.L.F., Richter, B.K., 2016, "Bridging Qualitative and Quantitative Methods in Organizational Research: Applications of Synthetic Control Methodology in the U.S. Automobile Industry", Organization Science, March/April 27(2): 462 - 482.

Fremeth, A., Holburn, G.L.F., Spiller, P.T., 2014, "The Impact of Consumer Advocates on Regulatory Policy in the Electric Utility Sector", Public Choice, October 161(1): 157 - 181.

We also host conferences on PRME topics at Ivey. On November 4, 2016, the Ivey Building Sustainable Value Center launched the first mini-conference on sustainability, co-organized by Ivey Sustainability faculty Diane-Laure Arjaliès, Tima Bansal and Oana Branzei. The agenda featured working papers by Ivey faculty, doctoral students, and post-doctoral fellow.

#### **Garima Sharma & Tima Bansal:**

"Objects Matter: Generating Knowledge at the Boundaries of Research and Practice"

#### Anna Kim, Tima Bansal & Helen Haugh:

"Tea-Time: Temporal Perceptions and Actions for Sustainable Development"

#### Juelin Yin & Oana Branzei

"Prosocial Outcomes of Non-Market Strategies for Multinational Companies in China"

#### Diane-Laure Arjaliès & Rodolphe Durand

"The Moral Awakening of Product Categories: Defining Social Responsibility in the Investment Industry"

**Hadi Chapardar:** "Tackling Sustainability Tensions Pragmatically: Implications of Paradoxical Thinking"

The 2016 Sustainability Conference showcased a plenary session with distinguished guests Donal Crilly, Fabrizio Ferraro, Joel Gehman on "Trends and Future of Research on Sustainability in Management".



**Donal Crilly** investigates how managers make sense of fuzzy and abstract concepts, including sustainability, social responsibility, and time. To address these issues, he draws on research on the interface of cognitive science and linguistics. Currently Assistant Professor of Strategy and Entrepreneurship at London Business School, Donal Crilly is an editorial board member of the Academy of Management Journal, the Strategic Management Journal, the Journal of International Business Studies and Strategic Organization.

"Time-Space Analogies and Control Beliefs: Why Approaching the

Future Makes for Short-Term Thinking"

**Fabrizio Ferraro** is Professor of Strategic Management at IESE Business School. He holds a PhD in Management from Stanford University. His current research explores the emergence of responsible investing and the role played by different actors (asset owners, asset managers, data providers), and different practices (portfolio management, shareholder engagement, impact measurement). Previously he has studied the institutionalization of the Global Reporting



Initiative, governance in open source software communities and has contributed to the development of the performativity perspective in organization theory. His work has been published in the Academy of Management Review, Academy of Management Journal, Organization Science, and Organization Studies, among others. He received the 2005 IESE Prize for Excellence in Research and the 2006 Best Paper Award from the Academy of Management Review. He serves or has served as a member of the editorial board of Academy of Management Review and Academy of Management Discovery, and European Management Review.

"Agreeable Disagreements: Attunement and Cognitive Alignment in Shareholder Engagement" (co-authors: Irene Beccarini, Daniel Beunza, Andreas Hoepner)



**Joel Gehman** joined the University of Alberta in 2012 as Assistant Professor of Strategic Management and Organization and was named the University of Alberta Petro-Canada Young Innovator in 2015-2016, the university's most prestigious early career award. Most recently he was awarded the 2016-2017 Batten Fellowship from the University of Virginia Darden School of Business. His research examines the organization of concerns: How do concerns related to sustainability and values affect organizational strategies, technology innovation, and institutional arrangements? And reciprocally, how do organizations, innovation and institutions affect the emergence and trajectory of cultural concerns?

In approaching these questions, Gehman draws primarily on organization theory, together with insights from strategic management, and science and technology studies. His work also takes a process perspective, focusing on the organization of concerns over place and time. To date, Gehman's research has resulted in 16 peer-reviewed articles and 5 edited book chapters. Ongoing research examines these issues in the context of technology entrepreneurship, B Corporations, unconventional shale gas drilling, hydraulic fracturing patents, shareholder activism, multinational divestitures, social license to operate, cultural understandings of risk, and university technology spinouts, among others.

"Hidden Badge of Honor: How Contextual Distinctiveness Affects Category Promotion Among Certified B Corporations" (co-author: Matthew Grimes)

Ivey faculty pride themselves in the teacher-scholar model which accelerates the mutual connection between research, classroom learning and practice. Many topics of research are directly informed by challenges leaders confront, and the vast majority of research publications are translated into practitioner-focused briefs and applications, appearing in the Ivey Business Journal, Harvard Business Journal and MIT Sloan.

Two examples of projects that bridge research, teaching and practice are:

The TalentEdge Fellowship, "Finding Research Based Solutions for Sustainability Practice," (\$330,000) will include cash and in-kind from The Cooperators, 3M, Tembec, Tim Hortons", received by Ivey faculty Tima Bansal and her post-doctoral fellows Jason Good and Garima Sharma.

Departmental Class Grants and Contributions Program, "Positive Energy: Building a Path to Social Acceptance and Support of Energy Development in Canada," (\$30,000), received by Ivey faculty Guy Holburn.

Ivey has an active media team, which promotes the discussion of key insights in mass media. Ivey research findings are regularly featured in top business publications, national radio and television. New insights on leadership character work and sustainability are frequently featured on national media. The Ivey speaker series also creates a periodic conduit between research and practice, by opening up books, reports and cases dealing with pressing issues to a large audience of Ivey alumni and the broader public.

## #5: Partnership

We will interact with managers of business corporations to extend our knowledge of their challenges in meeting social and environmental responsibilities and to explore jointly effective approaches to meeting these challenges.

Our case-based approach is predicated on a longer-term connection between issues, students and leaders. The reports commissioned by the Network for Business Sustainability offer a comprehensive set of publicly-accessible, free-of-charge thoughtpieces that can be immediately embraced in teaching and practice within Ivey, and beyond.

#### **Collaborative Community Development: A Guide for Managers**

January 9, 2017 by Verónica Devenin, PhD

Apply collaborative community development to boost the social legitimacy of your firm and drive regional sustainability in communities where you operate.

#### **Executive Guide: Business Models for Shared Value**

November 28, 2016 by NBS-SA

Shared value seems promising, but many managers struggle to make it happen. This executive guide provides a new approach by focusing on business models.

#### Competitor Collaboration: An Assessment Tool to Advance Sustainability

September 1, 2016 by NBS

Collaborations can be tense and complex. This tool responds to the question: How can managers improve competitor collaboration to advance sustainability.

#### **Executive Guide: CEO Decision-Making for Sustainability**

May 4, 2016 by NBS-SA

Leverage the CEO's position – at the interface between the external environment and the internal hierarchy of their companies – to drive sustainability.

#### **Executive Report: Strategic Planning**

June 23, 2015 by NBS

Planning for the future is essential to leadership. So how can businesses engage in strategic planning to create a shared vision for a sustainable future?

#### Long-Term Thinking in a Short-Term World

February 24, 2015 by NBS

This report provides a three-step process to balance short and long-term actions, cases, common obstacles to long-term action, and ways to overcome them.

Since 2015 Ivey has partnered with Matthew Thomas, founder of Paddle and Executive in Residence for Ivey's Sustainability Certificate, to mainstream the concept of Triple Strength Leadership across all Ivey programs. We jointly conducted multiple workshops in several different formats, using self-assessments and speakers, in both the HBA and MBA/ EMBA programs. We also convened a Triple Strength Leadership panel at the Cross-sector Partnerships for Systemic Change Conference, held in Toronto on April 17-20, 2016.

This panel featured Matthew Thomas, short talks from several triple strength leaders, and a skill-building exercise for participants. Matthew Thomas is the founder and chief executive officer of Paddle, a data-driven career development platform featuring digital assessments that enable users to develop non-linear and socially impactful careers. He also co-founded Prospect Madison, the Presidio Institute Cross Sector Leadership Fellows program and The Intersector Project, institutions that empower professionals to create public value by engaging and collaborating across the business, government, and non-profit sectors.



#### **6 EXPERTS (4 TED TALK SPEAKERS)**

Matthew Thomas **Neil Hetherington** Adrienne Lo Michelle Quintyn Frances Edmonds Regan Watts

Matthew co-published his research on cross-sector leadership with Harvard Business Review ("Triple Strength Leadership") and Global-is-Asian ("The Tri-Sector Athlete"), and has a forthcoming publication with Oxford University Press ("Re-imagining Capitalism"). His clients include Munk School of Global Affairs, Ivey Business School, Fugua School of Business, Singapore Management University, Johnson & Johnson, General Electric, and Community Foundations of Canada.

Matthew also serves as a David Rockefeller Fellow of the Trilateral Commission, and is a member of the World Economic Forum and Banff Forum communities. He formerly served as Practitioner-in-Residence at Duke University's Fugua School of Business, and as chairman of Young Diplomats of Canada, Young Canadians in Finance and CanLeads. He has delivered remarks on leadership to audiences at the White House, Corporate Executive Board, Maytree Foundation, and TEDxWesternU.

Previously, Matthew was a consultant with McKinsey & Company, having served clients in the retail, mining, and financial sectors, and contributed to the firm's efforts on Long-Term Capitalism and Canada in the Pacific Century. He started his career as an investment banking analyst with Morgan Stanley and financial sector stability economist with the Department of Finance Canada.

## #6 - Dialogue

We will facilitate and support dialog and debate among educators, business, government, consumers, media, civil society organizations and other interested groups and stakeholders on critical issues related to global social responsibility and sustainability.

Ivey explicitly encourages multi-disciplinary, cross-sectoral conversation on the principles of responsible management education.



The Ivey Business School is not afraid to feature speakers who have faced controversy or criticism. The Globe and Mail dedicated a full length feature on why Ivey chose to invite speakers like former Enron CFO Andy Fastow, infamous bond trader Nick Leeson and former White House intern Monica Lewinsky.

Dialoging with such controversial speakers is provocative, and educational. Such extracurricular events are interwoven with their Ivey courses. Students leverage these insights in full-length Ivey courses such as Giving Voice to Values where they rehearse for situations that may turn them from good to bad. They also benefit from a wealth of resources, frameworks and events that teach them how to be good leaders: responsible, reflexive, and responsive to the grand challenges of our time.

Ivey spearheads broader conversations featuring some of these controversial speakers in feature-length articles published in the Ivey Business Journal.

For example, in an Ivey Business Journal article published in the March/April 2016 issue, suggestively titled "Enron Explained," Gerard Seijts interviewed Enron's ex-CFO Andy Fastow (AF). Excerpts below:

**AF:** It never dawned on me that what I was doing could hurt anyone. My initial job was to do off balance sheet financing. And that evolved into doing structured finance, specifically to help the company meet its financial objectives. One of those financial objectives was to appear more creditworthy, or healthier, which lowers the cost of financing and expands access to capital. The way I saw it, at least at the time, was that this benefits the shareholders and employees, driving growth along with share-price increases. So I saw it as doing something good. But before we go further, let me say that what I did was absolutely wrong. Sitting here today, I believe that I was guilty of committing fraud, and I'm very sorry for that. I'm very sorry for my actions. So I'm not trying to make excuses when I say I thought I was doing something good. I'm simply telling you what I was thinking at the time, not trying to justify my actions. It's very important that you understand where I'm coming from. The fact that I did not see what I was doing as fraud, and the fact that I was not thinking that what I was doing could hurt people, doesn't mitigate what I did. It indicts me further for lacking the character required to identify those things.

We thought we were rocket scientists. Whenever a bank, an accounting firm, or a law firm came up with a new financing structure, they came to Enron with it first because they knew we would take the time to understand it and see if it made sense, and work with them on it.

#### **IBJ: So you actually felt creative rather than criminal?**

**AF:** Again, it never even dawned on me that what I was doing was criminal. The media portrayed us as a bunch of sinister guys sitting in a dimly lit room trying to think of ways to rip people off. It wasn't that way. When we did these creative deals, they weren't hidden. We had parties to celebrate them. We got awards for them. Magazines wrote articles that extolled the virtues of them. I'm not sure that it's fair to give myself the benefit of the doubt, but I like to think that I wouldn't have done what I did if it had dawned on me that my actions were potentially criminal. It just never did.

#### IBJ: Did you think in terms of business ethics?

**AF:** Well, I'm in my mid-50s, so business schools didn't have comprehensive courses on ethics when I did my MBA. The word "stakeholder" wasn't even used. When I was in business school, there was only one word — shareholder. And I thought what I was doing was good for shareholders and employees, so I thought I was doing my fiduciary duty.



Public humiliation destroys careers along with personal lives and reputations.

Nobody knows that better than Monica Lewinsky. Ivey faculty Gerard Seijts interviewed Monica in an Ivey Business Journal article that appeared in the March/April 2016 issue. Excerpts follow.

**ML:** There are two important things that victims of public humiliation need to remember. First, many people — those bullied and otherwise — suffer from shame or some form of public humiliation, so don't suffer in silence. Tell someone about what is happening and what you're experiencing. It's crucial to know that you are not alone. Reach out to someone and get help. Know that you can survive the shaming. When you are humiliated, it seems like there will never be a day, or even an hour, in which you can put the experience behind you. But that moment will come. People are stronger than they realize. As crippling as humiliation can feel, you are more than that moment or incident. The key is understanding that resilience is like a muscle that can be built up. We need to be thinking of resilience through a lens of preventative care. Like wearing a seatbelt.

#### GS: What steps should society take to make the online world more compassionate and empathetic?

**ML:** We need a cultural revolution when it comes to empathy and compassion in our society. To succeed, more people need to click with compassion. Algorithms for the net are created by what we click. And when content providers earn advertising dollars from clickbait, they are encouraged to serve up more articles rooted in shame and public exposure. So people need to understand that every time they click on gossip, or an article celebrating a public shaming, they are feeding the beast. People also need to actively take a stand and support the targets of bullying. That means posting a positive comment when you see someone being attacked, or sending a private message of support, or just using the emojies I mentioned earlier. On Safer Internet Day, February 9, 2016, a keyboard designed to help people do this became available in the Apple and Google Play stores.

### Women Inspiring Women

The 2016 event featured four speakers from three organizations: Amanda Armstrong, an HBA '10 grad from Textbooks for Change, Sonja Fernandes from Ezzy Lynn, and Colleen Lindemann and Tonia Richardson from Coupons for Hunger. All four leaders shared captivating stories on why they chose careers in social enterprise. They were all high energy, enthusiastic, and passionate about their jobs. And beyond that, they were all women.



In 2015 Ivey launched a campus-wide Social Enterprise Fair, held annually each January.

Armstrong began her presentation by explaining what exactly a social enterprise is: a for-profit business that has a mission for social good at its core. Armstrong has always been enthusiastic to shed light on a career path that's outside of the traditional four – accounting, finance, marketing, and consulting. "I'm a big believer in having people share their stories, mentorship, and inspiration," she said.

Fernandes, who studied philosophy at Huron College, sees events like the Social Enterprise Fair as a chance for students to hear about opportunities outside of what they learn in the classroom.

"These events enable students to think about business differently, through real stories and companies," she said. Case in point: Amy Zhou. A current HBA2 student, Zhou began her Ivey education unsure of where she wanted to end up. Resources like the Social Enterprise Fair, and Professor Oana Branzei's Social Enterprise class, helped her find her way. "I completely changed career tracks," she said. "I'm now pursuing the Certificate in Entrepreneurship. Social enterprise is really the best of both worlds – nonprofit and for-profit." Fernandes discovered her passion for social enterprise through Western Propel. At the time, there weren't many female students in the start-up space. The Ezzy Lynn team says that the lack of women was their biggest motivator to create their own venture. "We are all about empowering women," Fernandes said. "Strong female leaders have inspired us and we can only hope to be that same inspiration for other young women."

Armstrong hopes to combat the gender gap in business by supporting and encouraging women. Providing role models and mentors for young women is important, she said, and helping them develop confidence is crucial to success. Inspired to show off some of Ivey's female role models, Zhou, a Co-President of the **Women in Management Club**, is now in the process of interviewing successful alumnae and sharing their stories online. "Women are typically under-represented in the business world and in start-up companies," Armstrong said. "Initiatives like this are important. We need to showcase all the women who are already doing awesome things in leadership positions."

## KEY OBJECTIVES FOR 2017-2018

The Ivey School of Business has identified the following objectives as key initiatives that the School would like to pursue in relation to the PRME Principles in the next two years:

A new courses featuring applications and implications of the seventeen SDGs using sharing economy models will be added to our Corporation & Society offering. This course will require the development of at least one case for each of the 17 principles, accompanies by exercises that help develop goal-related sensitivity and skills. Most of the cases will feature young leaders who are tackling the grand challenges of our time through innovative and scalable responses. For example, we are preparing the Soular case showing how a young Canadian leader designed a backpack that enables children in extreme poverty context to study, and regain control over their lives through education. The accompanying exercise coaches students through the intricacies and idiosyncracies of pitching social causes, introducing them to linguistic scripts and tips that help them attract traditional investors as well as crowdfunding enthusiasts. The course will also develop a personal framework, bringing together the building blocks of personal agency

In collaboration with Ivey Publishing, we will release a casebook that matches the SDGs with examples of one traditional corporate response and one radically transformative venture, ranging from social enterprises to cross-sector collaboration and pre-competitive action.

We plan to mainstream one signature social venture competition, sponsored and supported by the Entrepreneurship Institute and one non-profit signature event funded by the Building Sustainable Value Center. These events will balance our well-established in-house events and the addition of global initiatives such as the Hult Case Competition.

We are in the process of designing custom workshops that can be delivered by Ivey faculty and students to cross-campus and community incubators, such as Propel and Innovation Works.

Within the Ivey community we will be providing a dedicated PRME launch-pad where Ivey alumni and other leaders can update and upgrade their leadership skills through interactive activities, including interview excerpts with controversial leaders and a new signature "Under Pressure" series that spans the range of corporate responses to dramatic shifts in policy, from Trump's controversial executive orders to Brexit and the Syrian refugee crisis.

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APPENDICES

# Appendix A: Materials (selected Ivey Publishing case studies)

9B16M179

**AIACA: Interventions for Sustainable Livelihoods** 

Sonu Goyal;

In 2003, the All India Artisans and Craftworkers Welfare Association (AIACA) was launched to explore new and commercially sustainable models of livelihood promotion for India's vulnerable communities of craftworkers. The Indian handlooms and handicrafts, collectively referred to as the craft sector, symbolized the rich historical and cultural diversity that distinguished India from the rest of the world. The sector provided low-cost, "green" livelihood opportunities to millions of Indian families, supplementing their incomes in seasons of agrarian distress, checking migration, and preserving traditional economic relationships. The sector represented the economic lifeline of the most vulnerable sections of Indian society. AIACA took a unique approach towards stakeholder engagement by establishing partnerships with local non-governmental organizations, business enterprises, individual craftworkers, self-help groups, and government agencies. This level of co-operation produced effective advocacy and high-impact developmental work through multiplicative strategies, and the results were scalable and replicable in the context of informal sectors in transitioning economies. AIACA had spent a decade successfully designing and implementing livelihood interventions to help small-scale, family-managed businesses evolve into sustainable enterprises and innovative networks. The organization now needed to re-examine its approach and look for ways to deliver a deeper developmental impact.

Publication Date: October 31, 2016

Discipline: General Management/Strategy; International

Length: 13 pages

Issues: social business model, institutional voids, informal sector, livelihood promotion, NGOs

Industry: Social Advocacy Organizations

Setting: India, Small organization, 2003 to 2013

Learning Objective: This case is suitable for courses in graduate or short-duration programs on

sustainable development. This case can also be used in a course on public policy or strategies for doing business in emerging markets with a focus on the role of non-governmental organizations. After completion of this case, students will be able to understand and appreciate the concerns and challenges faced by small producers due to a lack of institutions in the informal sector in developing economies; understand the nature of institutional voids, and various non-governmental organizations' approach to effectively spotting and responding to the lack of institutions for building sustainable interventions; and understand AIACA's approach to creating a scalable and sustainable social business model, while promoting sustainable livelihoods.

#### 9B16M171

**De Beers Canada: The Attawapiskat Context** 

Ron Mulholland

De Beers, a sophisticated, international mining company, operated the Victor Mine, an open pit diamond mine in Canada, located within traditional territory claimed by the Attawapiskat First Nation. To develop the mine, De Beers had to follow provincial and federal legislation, meet environmental standards, and most importantly, negotiate use of the land with the First Nation. Although the mine was successful, the First Nation community was suffering with health, education, and housing issues; rampant unemployment; and a remarkably high rate of suicide among its youth. Benefits negotiated in the mining agreement were not resolving the problems, despite the provision of employment opportunities and payment of millions of dollars to the First Nation. In frustration, the First Nation set up road blockades to stop work at the mine. De Beers now wanted to extend their mining operation by using a mine extension, but to do that, they had to seek further agreement from the Attawapiskat. Did the history of First Nations in Canada affect their relationship with De Beers? Were the stakeholders meeting their responsibilities? What lessons could be applied to negotiations for future developments?

Publication Date: October 21, 2016

Discipline: General Management/Strategy;

Length: 13 pages

Issues: CSR, ethics, first nations, mining, diamonds, indigenous peoples, truth and

reconciliation

Industry: Mining, Quarrying, and Oil and Gas Extraction;

Setting: Canada, Large organization, 2016

Difficulty: MBA/Postgraduate

Learning Objective: The case deals with the complex nature of corporate social responsibility and is written for a graduate course in strategy, organizational behaviour, sustainable development, or ethics. The case examines the development and results of an impact benefit agreement between De Beers and the Attawapiskat to illustrate the complex nature of relationships between resource companies and Indigenous communities. The case raises questions regarding the responsibility of governments, mining companies, and the communities themselves in their quest for social and economic development. Historical context is considered, and the challenges and opportunities faced by the community and

De Beers are evaluated. Using this case will help students to understand the context for community and economic development of Indigenous communities; identify CSR processes and outcomes for resource development companies; and define government responsibility with resource development on Indigenous lands.

#### 9B16A030

#### Jane's Short & Sweet: Purpose, People, and Profit

Kelly Ann Irvin; Mary Conway Dato-on

In 2015, jane's short & sweet, a United States-based for-profit business, regularly dedicated 25 per cent of its revenue to charities supporting its mission of improving the education and healthcare of marginalized women. The company also engaged in some environmental practices with respect to its use of resources, jane's short & sweet's owner understood that she would have to make some trade-offs between people and profit while still attempting to remain consistent with her company's social purpose and contribute to the resolution of its current problem—finding a way to fill a customer order that exceeded the company's production capacity. While addressing the company's new labour needs, the owner needed to evaluate how the trade-off between mission and money would affect the company's labour source, hourly wages, pricing strategy, product price, and organizational goals. To do so, the owner had to identify and evaluate the options that would enable her to better fulfil her company's role as a social sustainable enterprise.

Publication Date: July 15, 2016

Discipline: Marketing; Entrepreneurship;

Length: 8 pages

Issues: social enterprise, retailing, pricing, sustainability

Industry: Manufacturing;

Setting: United States, Small organization, 2015

Difficulty: MBA/Postgraduate

Learning Objective: The case provides students with the following learning opportunities:

- Compare and contrast what constitutes a social enterprise versus a sustainable development enterprise by identifying the components of each and evaluating jane's short & sweet accordingly.
- Explore the conflict between mission and money, examining the ways that a social purpose in a for-profit business affects the trade-offs between people and profit when deciding on labour type and wages.
- Understand the intersection of marketing and finance by calculating simple profit and loss statements and using these statements as one criterion for establishing a product price and pricing strategy.

- Investigate the ecosystem of social enterprises through the discussion of connections among for-profit enterprises, non-profits, and retailers.
- Make human resource, operations, marketing, and finance decisions while facing the challenges that are common to small- and medium-sized enterprises and social enterprises.

#### · ·

9B14N020

#### **Investing Sustainably at Ontario Teachers' Pension Plan**

Robert Klassen; Cory Tanaka

In early 2014, the senior vice-president of the Ontario Teachers' Pension Plan is considering two investment opportunities in the oil and gas industry brought forward by his team. He is trying to understand how to ensure that the principles underpinning responsible investing are incorporated in the decision about which to choose. Each investment looks very attractive, but a growing stream of controversies surrounding oil sands extraction, pipeline safety and environmental protection has raised concerns. He faces multiple questions: How can the impact of these environmental, social and governance issues be quantified precisely? Can they be translated into an informed investment decision that the organization's stakeholders will accept? What approach to responsible investing is appropriate for a pension fund? What alternative methods of incorporating these issues into the investment decision process should be considered?

Publication Date: September 10, 2014

Discipline: Finance; Operations Management;

Length: 19 pages

Issues: Sustainable development; operational risk; investment analysis; oil and gas; investing;

Canada

Industry: Finance and Insurance;

Setting: Canada, Large organization, 2014

Difficulty: Undergraduate/MBA

Learning Objective: The case was developed for undergraduate, graduate and executive education levels. It allows students:

- To understand and assess several major challenges related to responsible investing and sustainability within the specific context of oil sands development.
- To introduce the Principles for Responsible Investment approach to responsible investing.
- To explore how incorporating environmental, social or governance information can lead to more comprehensive analysis and risk-adjusted returns over the long run.
- To consider the trade-offs faced by companies between short- and long-term financial performance when addressing environmental or social issues.

#### 9B15M008

#### Tata Chemicals Magadi: Confronting Poverty in Rural Africa

Michael Valente:

In the summer of 2013, the managing director of Tata Chemicals Magadi, Africa's largest soda ash manufacturer and one of the oldest and largest export earners in Kenya, was wondering how he was going to respond to a growing number of challenges. As a producer of a commodity product, the company was vulnerable to escalating energy costs, oversupply and economic cycles. Global growth had been sluggish since the 2008 economic recession and competition was intense, especially since the emergence of Chinese producers. Magadi Township, where the company's production facility was located, was one of the poorest in the country, subject to droughts and without many of the basic public services typically provided by government such as roads, health care, electricity, water and education. To address these needs, the company migrated from a top-down, paternal, ad hoc and resource-intensive approach to a bottom-up, collaborative, holistic and resource-sharing style that focused on community capacity building and self-governance. However, the issue now is how to best balance the strong need to reduce costs while remaining committed to the sustainability of the surrounding community.

Publication Date: February 20, 2015

Discipline: General Management/Strategy; International;

Length: 11 pages

Issues: Mining; community; CSR; Kenya Industry: Mining, Quarrying, and Oil and Gas Extraction;

Setting: Kenya, Large organization, 1990-2013

Difficulty: Undergraduate/MBA

Learning Objective: The case is intended for senior undergraduate or MBA courses in international business, extractive industries and corporate social responsibility. Its objectives are:

- To understand how companies in the mining and extractive industries, typically criticized for contributing to negative externalities in and around the communities in which they operate, can be a key player in contributing to poverty reduction and sustainable development.
- To understand the different approaches companies use to respond to extreme poverty surrounding their operations.
- To understand how and why companies transition between different approaches in response to extreme poverty.

#### 9B15M024

#### **Tesla's China Drive**

Yan Gong; Qiong Zhu;

As a newcomer in the automobile industry, Tesla Motors had distinguished itself by redefining automobiles and rewriting some of the rules of the automobile industry. Ten years after its founding, it had begun to make inroads into China — a totally different market from Europe and the United States — and commenced its globalization efforts. China had set "new energy" as its major strategy for sustainable development and national security. Which path should Tesla follow to make China its second-largest market? How can Tesla's director for China overcome the company's strategic challenges in innovating in the Chinese market?

Publication Date: February 27, 2015

Discipline: General Management/Strategy; International; Entrepreneurship;

Length: 14 pages

Issues: Internet; innovation business model; new energy vehicle; China

Industry: Manufacturing;

Setting: China, Medium organization, 2014

Difficulty: MBA/Postgraduate

Learning Objective: This case has been designed primarily to facilitate discussion on global strategy development in courses on strategy, technology and business model innovation. It can be used in MBA classes, EMBA classes and executive development programs. Participants can be executives from state-owned or foreign enterprises, owners of private firms and professional managers. Students will learn:

- How to choose a strategy based on specific local conditions during the process of globalization.
- How to plan business model innovation in a new market for cross-border enterprise

## Appendix B: Research

Almeida, H., Cunha, I., Ferreira, M., Restrepo, F.	The Real Effects of Credit Ratings: The Sovereign Ceiling Channel	Journal of Finance
Babashov, V., Aivas, I., Begen, M.A., Cao, J.Q., Rodrigues, G.B., D'Souza, D., Lock, M., Zaric, G.S.	Reducing Patient Wait Times for Radiation Therapy and Improving Treatment Planning Process: A Discrete-event Simulation Model	Clinical Oncology
Bansal, P., Kim, A.K., Wood, M.O.	Hidden in Plain Sight: The Importance of Scale on Organizational Attention to Issues	Academy of Management Review
Bansal, P., Sharma, G.	Partners for Good: How Business and NGOs Engage the Commercial-Social Paradox	Organization Studies
Bansal, P., Song, H-C.	Similar but not the Same: Differentiating Corporate Responsibility from Sustainability	Academy of Management Annals
Bell, P.C., Chen, J.	Close Integration of pricing and supply chain decisions has strategic as well as operations level benefits	Annals of Operations Research
Bendle, N.T., Bagga, C.	The Confusion About CLV In Case- Based Teaching Materials	Marketing Education Review
Branzei, O., Frooman, J., McKnight, B., Zietsma, C.	What Good Does Doing Good Do? The Effect of Bond Rating Analysts' Corporate Bias on Investor Reactions to Changes in Social Responsibility	Journal of Business Ethics
Cerasuolo, J.O., Cipriano, L.E., Sposato, L.A.	The complexity of atrial fibrillation newly diagnosed after ischemic stroke and transient ischemic attack: advances and uncertainties	Current Opinion in Neurology
Chakravarty, D., Hsieh, Y., Schotter, A., Beamish, P.W.	Multinational Enterprise Regional Management Centres: Characteristics and Performance	Journal of World Business

Chen, J., Bell, P.C.	Enhancing Revenue by Offering a Flexible Product Option	International Transactions in Operational Research
Col, B., Patel, S.	Going to Haven? Corporate Social Responsibility and Tax Avoidance	Journal of Business Ethics
Connors, S.C., Anderson- MacDonald, S.A.M., Thomson, M.	Overcoming the 'Window Dressing' Effect: Mitigating the Negative Effects of Inherent Skepticism towards Corporate Social Responsibility	Journal of Business Ethics
Crossan, M.M., Byrne, A., Seijts, G.H., Reno, M., Monzani, L.M., Gandz, J.	Toward a framework of leader character in organizations	Journal of Management Studies
Cui, V., Vertinsky, I., Robinson, S., Branzei, O.	Trust in the Workplace: The Role of Social Interaction Diversity in the Community and in the Workplace	Business and Society
Dai, L., Eden, L., Beamish, P.W.	Caught in the Crossfire: Dimensions of Vulnerability and Foreign Multinationals' Exit from War-Afflicted Countries	Strategic Management Journal
Dixon, M.J., Victorino, L., Kwortnik, R.J., Verma, R.	Surprise, anticipation, and sequence effects in the design of experiential services	Production and Operations Management
Flammer, C., Bansal, P.	Does a Long-Term Orientation Create Value? Evidence from a Regression Discontinuity	Strategic Management Journal
Foerster, S.R., Linnainmaa, J., Melzer, B., Previtero, A.	Retail Financial Advice: Does One Size Fit All?	Journal of Finance
Foerster, S.R., Tsagarelis, J., Wang, G.	Are Cash Flows Better Stock Return Predictors Than Profits?	Financial Analysts Journal
Getachew, Y., Beamish, P.W.	Foreign Subsidiary Exit from Africa: The Effects of Investment Purpose Diversity and Orientation	Global Strategy Journal

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## Appendix C: Sustainability On Campus

The University of Western Ontario is a signatory to the Talloires Declaration which was developed in 1990 as a ten-point action plan for incorporating sustainability and environmental literacy in teaching, research, operations and outreach at colleges and universities. Among the countless initiatives that the University has undertaken in furtherance of this Declaration include the following:

**Western Environmental System**: Western Environmental System (WES) is the single most significant tool in energy consumption on campus. It is an advanced HVAC system that can remotely control campus air systems allowing Physical Plant to schedule the shutdown of service to areas of non-occupancy (i.e., evenings and weekends). A large majority of buildings on campus (50+) are supported by the system and each new building is added as they go online. Retrofitting of older buildings will be a gradual upgrade.

**Lighting Retrofit**: Physical Plant is turning the corner on a five year plan to eliminate inefficient lighting on campus. As the project enters its final years, there is definitely, sustainable light at the end of the tunnel. Energy-saving T8 ballasts are replacing nearly 50,000 T12 fixtures that illuminate the rooms and halls in dozens of campus buildings. According to the figures in the audit, conducted by King Energy Management Inc., the project will pay for itself through energy savings in about three years. The new fixtures are estimated to use at least 30 per cent less energy than that of its predecessor. The new lamps have a lot of advantages. In addition to being more efficient, the quality of light output is much greater.

**CFLs in the Residences**: All study/desk lights in the residences were replaced. In a cooperative with Housing, Physical Plant, and London Hydro 11, 000 incandescent bulbs were switched out and energy saving compact fluorescent bulbs were put in their place.

**Online Academic Calendar**: To lessen the impact on the environment, effective February 2009, the Office of the Registrar only produces an online version of the Academic Calendar for students. There was an immediate impact on the environment - we are saving more than 11,040,000 sheets of paper (24,000 copies of the Academic Calendar) this year alone.

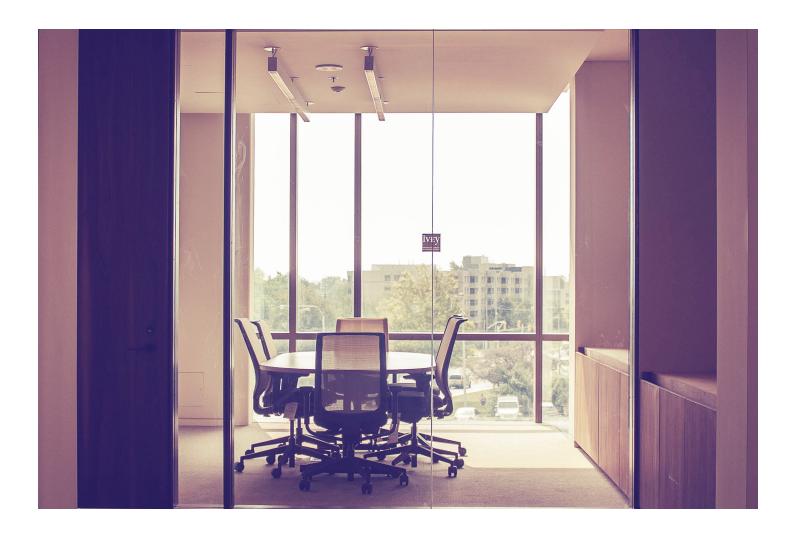
Plastic Bags: The Book Store at Western introduced several initiatives to reduce plastic bags

and their detrimental effects on the environment:

- 1. The Book Store gave away reusable shopping bags to new students and parents during Student Academic Orientation, Homecoming and special events. Reusable bags are also sold in the store.
- 2. The Book Store switched to biodegradable plastic bags, which decompose in 12 to 24 months as opposed to regular plastic bags, which can take decades if not centuries to biodegrade.

**Eateries Reducing Paper & Packaging**: Hospitality Services completely eliminated the use of styrofoam from its Residence Dining Halls. New bio-degradable and compostable take-out containers are being phased in. Paper cups are not recyclable and account for a significant amount of waste at Western. A discount, provided to customers who purchase a hot beverage with a travel mug, is helping to promote alternatives to paper cups..

Herbicides / Pesticides: Harmful fungicide and pesticides are used on campus and haven't been for more than a decade. Grounds will be phasing out herbicides for weed control on hard surface (between sidewalk slabs). There is a plan to rely on natural remedies in a conversion to all environmental products. The Ministry of Health and Ministry of Environment have requested that infestations that may harm the public or environment are controllable with chemicals. The process for chemical use is lengthy and requires approval from the government prior to application.



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