

PAS 808:2022

Purpose-driven organizations – Worldviews, principles and behaviours for delivering sustainability – Guide



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Foreword

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Presentational conventions

The guidance in this PAS is presented in roman (i.e. upright) type. Any recommendations are expressed in sentences in which the principal auxiliary verb is "should".

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Where words have alternative spellings, the preferred spelling of the Shorter Oxford English Dictionary is used (e.g. "organization" rather than "organisation").

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0 Introduction

0.1 General

Long-term wellbeing for all people and planet could be the closest we might get to a “meta-purpose” of society as a whole, something the Brundtland report sets out in detail¹⁾. The problems facing this societal meta-purpose are now at a crisis point, with leading scientists and global representatives desperately calling for radical and urgent change to the way we treat nature and people. The near-term threat of catastrophic climate change is just one of many markers of our crisis point.

This PAS outlines how becoming a Purpose-Driven Organization (PDO), will help solve these grand challenges and meet the increasing demands of society.

Organizations are society's chosen innovation vehicle. They bring people and resources together in an “economy” in order to create something of value to that society. The ultimate value goal of society, and the economy, is the same as the goal of sustainability – to achieve high levels of wellbeing for everyone, in a way that can continue over the long term. In other words, the goals of society, sustainability and the ultimate goals of the economy are aligned. And yet our sustainability crisis reveals that organizations are not optimized for this goal and are often pulling in the opposite direction. Becoming a PDO fully aligns an organization with society and sustainability, and while not easy, helps overcome many of the tensions, challenges and drags on innovation that organizations are currently facing.

0.2 The new demands on organizations

Organizations are judged to be both core to the cause of the sustainability crises and core to the solutions needed. Society is demanding that organizations lead the charge to create profitable solutions to the problems of people and planet and not harm them, or worse, profit from harm. Specifically, society is asking organizations to:

- a) gear their innovation to the solutions to long-term wellbeing for all people and planet;
- b) prove they are not degrading the social and environmental systems that everyone relies on in the process and;
- c) achieve these goals in a method that is wise and ethical, even if that is beyond what the law dictates.

0.3 The challenge for organizations

More and more organizations say they want to be purpose-driven, but it is difficult because it is such a departure from the philosophy that has driven the conventional approach for business since the 1970s. That philosophy says that as long as an organization is operating in their own financial or survival interest, staying within the law and engaging competitively in the market, then market will automatically optimize society's wellbeing. This self-interest motive leads naturally to a focus on capturing this financial income as quickly as possible. A short-term self-interest approach is most obvious in large public or private businesses, but it is also evident in organizations of all kinds and all sizes, including governments, higher education, non-governmental organizations and small and medium-sized enterprises. To ease stakeholder pressure to address the negative effects of this, many organizations have adopted corporate social responsibility (CSR) programmes. These tend to result in an ad-hoc series of actions which do good, and can be comprehensive and multi-year, but remain peripheral to the operation of the business.

¹⁾ Here we use an operational rewording of the Brundtland report's definition of sustainability: “*development that meets the needs of the present without compromising the ability of future generations to meet their own needs*”, with needs being the core way in which wellbeing is achieved. The addition we make here is to include the wellbeing of the “planet” as an end goal which is an umbrella term to encapsulate all potential ethical stances about the intrinsic value of nature including “eco-centricism”, “species-centricism” and “deep ecology”. Ultimately the wellbeing of people and planet is inseparable and so pursuing one fully, helps achieve the other.

More recently some organizations have started to take the science on the degradation of our social and environmental systems and the demands of stakeholders seriously. These organizations realize they need to shift their decision making consciously in their long-term self-interest. As a result, they create a rationale to actively invest in the health of the systems, resources and stakeholders they rely on. This enlightened view is connected to stakeholder capitalism where the perspectives and interests of the full range of different stakeholders in their business are being systematically considered – workers, customers, suppliers and the communities in which they operate. These organizations are also starting to increase their knowledge of how they impact social and environmental systems and set targets in a genuine attempt to reduce their negative impact. But this approach is still limited in its ability to address the profound crises we face, because it does not put a sustainable future at the heart of the value creation ambitions of an organization. To align fully with a sustainable future requires an organization to become a purpose-driven organization.

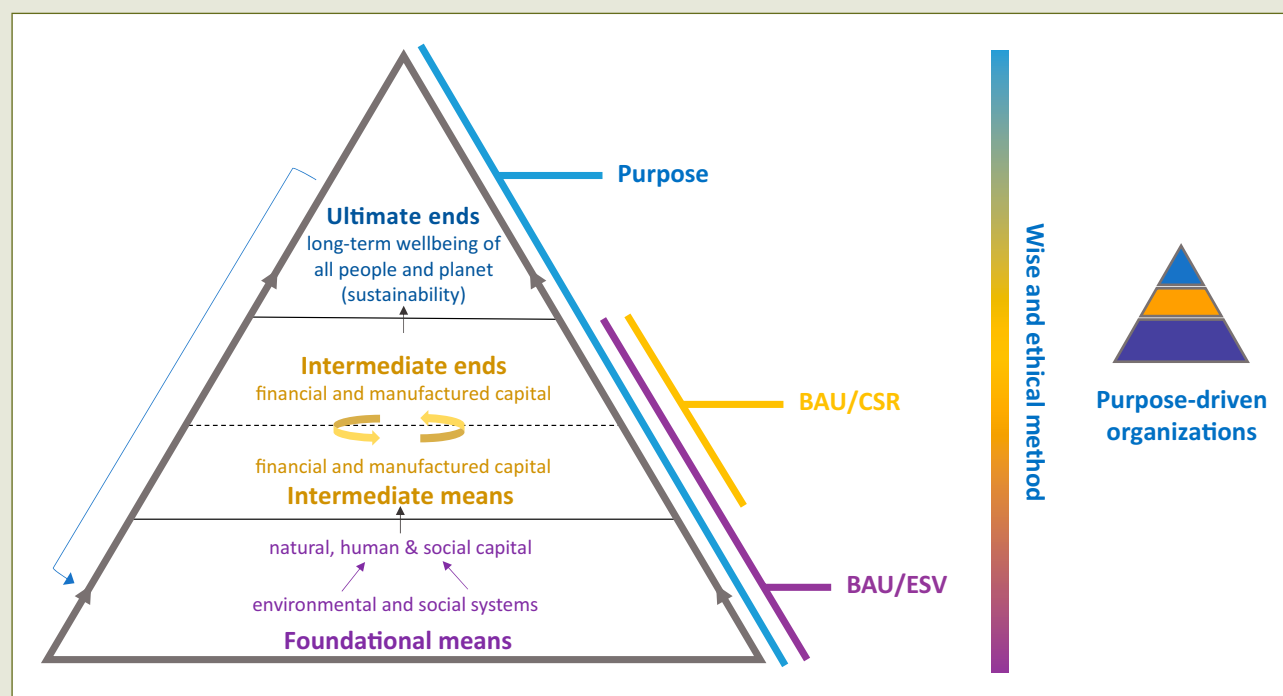
0.4 Purpose-driven organizations

As pressure for deeper root and branch transformation grows, PDOs are responding directly to it. Purpose-driven organizations have made a break with conventional thinking and are built (or being re-built) to meet society's new demands and work for sustainability by design. PDOs:

- a) exist for a meaningful end – to achieve an optimal strategic contribution to the long-term wellbeing of all people and planet (sustainability), and therefore are innovatively aligned with a sustainable future and society's best interest (see 7.1, Wellbeing ends);
- b) make sure that, at a minimum, and regardless of its purpose, they make a fair and adequate contribution to ensuring that the systems, capitals and stakeholders they rely on are healthy – hence not overexploited and regenerated where needed. Failing in this would risk long-term wellbeing of all people and planet; the basis of a PDO's reason to exist (see 7.2, Healthy means); and

- c) approach these two tasks with decision-making that is both wise (thoughtfully based on the best available evidence about the system as a whole in the long-term) and ethical (based on strong values that are in line with the moral landscape about how people ought to be treated), weeding out unethical and imprudent decision-making based on ill-considered information or decision-making which does not support the wellbeing of those it interacts with and influences (see 7.3, Wise and ethical methods).

Transitioning to being PDO is challenging because it changes core assumptions about the role and remit of organizations – but by doing so, it also unleashes organizations to fully meet the real and urgent challenges we face. Figure 1 outlines how the conventional short-term self-interest approach is focused narrowly on producing intermediate ends, via intermediate means; how a long-term self-interest approach extends the legitimate concern of organizations to investing in the health of the foundational means (and associated ultimate capitals); and how PDOs are focused on the ultimate ends, foundational means and wise and ethical method.

Figure 1 – The ends, means and method of purpose-driven organizations²⁾

NOTE See Annex A for answers to frequently asked questions about purpose-driven organizations.

0.5 The aims of this PAS

This PAS sets out what it means to be a PDO in practice by outlining key worldviews, values, principles, behaviours and defining key terms. It aims to give confidence to those who are genuinely seeking to become purpose-driven or who already are purpose-driven, to shout more clearly and consistently about their struggle and their success, and help others see what is possible. PAS 808 provides a way for an organization on a purpose-driven journey to understand both where it is going and how far away from that it might be, although it does not describe how to take the journey. This PAS can form the basis of accountability for an organization and help demonstrate their level of maturity in becoming purpose-driven to its stakeholders. It is not a certification standard however, and therefore the provisions are written as guidance and good practice. It is hoped that this PAS will therefore also reduce the number of organizations making false claims about purpose and in doing so diluting its incredible potency and potential to systemically address issues of our unsustainable global economy. It is also an aim of this PAS that policy makers, regulators and all other stakeholders be able to diagnose how far they are supporting or hindering these types of truly valuable organizations to become successful PDOs.

0.6 How to use this PAS

This PAS is based around the behaviours of a PDO, the principles that guide these and the worldviews that underpin them. The principles and behaviours are organized in relation to the core objectives of a PDO: achieving wellbeing ends, assuring healthy means and employing a wise and ethical method. Figure 2 sets out the framework for this PAS and the way that the PAS is organized.

This PAS starts by exposing PDO worldviews. These are the base assumptions that unite and characterize PDOs. These are assumptions about what is valuable and how the world works. As such they underpin the principles PDOs use to make decisions and, in turn, these principles motivate the patterns of behaviour PDOs tend to demonstrate. The more of these behaviours an organization demonstrates, and the more frequently an organization demonstrates them, the more likely, and robustly, it is to be a PDO. This PAS does not include an exhaustive list of all the principles and behaviours that PDOs might demonstrate but focuses on those that set them apart from non-PDOs.

²⁾ Adapted from Donella Meadow's adaptation of Herman Daly's triangle of a sustainable economy.

0.7 Where to start?

All worldviews, principles and behaviours listed in this PAS are included because they are deemed important markers of a PDO, even though others might exist. They are not prioritized and do not represent a journey that starts at Principle 1 and ends at Principle 7. However, for organizations seeking to start, or further, their journey to being purpose-driven, understanding personal and organizational worldviews and examining how aligned they are to a PDO (see Table 2) is important as worldviews form the basis of purpose and values. If these are misaligned with a PDO, then behaving in line with the principles and behaviours set out in this PAS will be unnecessarily hard. This could lead to damaging behaviours, such as purpose-washing (where an organization overstates or misstates their purpose-driven motives) and purpose-hushing (where genuine action is hidden and progress slowed).

Some organizations, after considering their worldviews, might identify themselves as being driven by long-term self-interest. Here, long-term financial income or survival is what primarily guides decision-making. For those organizations, this PAS can still be of use, prior to moving towards being fully purpose-driven. In order to contribute to the health of the social and environmental systems that underpin organizational success, the two MEANS principles (Principle 3 and Principle 4) will be a useful place to focus on, in conjunction with the METHODS Principles 5, 6 and 7. After progressing against these principles, it is likely that looking again at worldviews might result in the level of ambition needed to move towards becoming a PDO.

0.8 Who is this PAS for?

This PAS provides guidance for organizations and their stakeholders. Although everyone in a PDO has an important role to play in bringing about the desired behaviours, the behaviours in this PAS are directed at governing bodies and executive managers because of their accountability, and power, to shape action across the organization. The table in Annex B sets out the areas of an organization where the behavioural categories detailed in this PAS are most likely to be driven by and demonstrated, although this will vary by organization and small organizations are unlikely to have these distinguishable areas. This PAS is also useful for anyone who works for an organization that wants to initiate and support change towards becoming a PDO, e.g., legislators who do not want to hinder these kinds of truly valuable organizations, and instead clear the way for them, and ideally incentivize them. The guidance in this PAS simultaneously serves as a tool for external stakeholders to hold an organization to account for any purpose-driven claims. If an organization is not demonstrating a high occurrence and frequency of the behaviours outlined in this PAS it has little basis upon which to claim that it is purpose-driven. If an organizational purpose cannot be justified as an optimal strategic contribution to long-term wellbeing for all people and planet, which guides all decision-making in the organization, it is something other than a purpose, such as a brand promise, positioning statement, strategy or financial goal.

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1 Scope

This PAS gives guidance to governing bodies and executive managers on what a purpose is, how a purpose-driven organization (PDO) approaches decisions, and how it acts.

It outlines the worldviews, principles and the associated behaviours and activities of a PDO. It establishes common terms and definitions related to purpose.

This PAS gives guidance to governing bodies and executive managers of organizations on how to:

- a) develop their understanding of purpose and determine the relevancy and level of challenge of their individual organization in becoming a PDO;
- b) understand the worldviews, principles and behaviours of a successful PDO and determine what their organization might need to do to be aligned with these;
- c) provide the basis for an organization to develop their own strategies and approaches to enacting and embedding purpose in their policies, processes, practices, products, services and value networks; and
- d) provide the basis for aligning the purpose with decision making across the organization.

This PAS is primarily intended to be used by governing bodies and executive managers in organizations of any size and type in their understanding and implementation of a purpose. It is applicable to all organizations, including:

- 1) private and public sector organizations;
- 2) regulators;
- 3) central and local government; and
- 4) professional bodies.

It is also intended to be relevant to others who provide services and support to organizations and for a wider set of stakeholders who might benefit from understanding purpose and who might invest in, support and help hold organizations to account for their commitments to purpose.

This PAS does not include specific guidance on how an organization can transform into becoming a PDO.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes provisions of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies:

BS ISO 37000, *Governance of organizations – Guidance*

3 Terms and definitions

3.1 accountability

obligation to another for the fulfilment of a responsibility (see 3.23)

NOTE 1 The obligation includes the duty to inform and to explain the manner in which the responsibility was fulfilled.

NOTE 2 The non-fulfilment of a responsibility has consequences that can be enforced on the accountable party.

3.2 capitals

stocks of value that are affected or transformed by the activities and outputs of an organization

NOTE Capitals can include ultimate capitals such as social, human and natural capitals as well as capitals that derive from these including financial and manufactured capital.

3.3 compliance

meeting all the organization's (3.15) compliance obligations (3.4)

[SOURCE: BS ISO 37301:2021, 3.26]

3.4 compliance obligations

requirements that an organization (3.15) mandatorily has to comply with as well as those that an organization voluntarily chooses to comply with

[SOURCE: BS ISO 37301:2021, 3.25]

3.5 constituting documents

authoritative and unique set or collection of documents that establishes the organization's (3.15) existence and accountability (3.1)

NOTE Documents vary depending on the type and location of the organization, and can include a deed of incorporation, articles of association or charter and can be amended from time to time.

3.6 delegation

assignment of authority and responsibility (3.23) from one that holds them to another

3.7 ethical behaviour

behaviour that is in accordance with accepted principles (3.21) of right or good conduct in the context of a particular situation and is consistent with international norms of behaviour (3.13)

[SOURCE: BS EN ISO 26000:2010, 2.7]

3.8 executive manager

person who has authority delegated from the governing body for implementation of strategies and policies to fulfil the purpose of the organization

[SOURCE: BS ISO/IEC 38500:2015, 2.7, modified – Notes 1 and 2 have been deleted]

3.9 financial profit

monetary gain, especially the difference between the amount earned and the amount spent in buying, operating, or producing something

3.10 governance of organizations

human-based system by which an organization (3.15) is directed, overseen and held accountable for achieving its defined purpose

[SOURCE: BS ISO 37000:2021, 3.1.1]

3.11 governing body

person or group of people who have ultimate accountability (3.1) for the whole organization (3.15)

NOTE 1 Every organizational entity (3.15) has one governing body, whether or not it is explicitly established. When the organization is not an organizational entity, the term governing group (3.12) is applicable where "governing body" is used throughout this PAS.

NOTE 2 A governing body can be explicitly established in a number of formats including, but not limited to, a board of directors, supervisory board, sole director, joint and several directors, or trustees.

NOTE 3 ISO management system standards make reference to the term “top management” to describe a role that, depending on the standard and organizational context, reports to, and is held accountable by, the governing body.

3.12 governing group

person or group of people who govern an organization (3.15)

NOTE 1 In some cases, the governing group can include executive managers or persons who have a top management role, while keeping management and governance roles distinct.

NOTE 2 In some cases, the governing group can include a person or group of people representing an organizational entity (3.15).

NOTE 3 Where an organization spans multiple organizational entities, it is governed by a governing group. Additionally, where an organization exists wholly within an organizational entity (e.g. a subsidiary company or department), it has a governing group that is responsible for maintaining the organizational entity's integrated governance.

NOTE 4 ISO management system standards make reference to the term “top management” to describe a role that, depending on the standard and organizational context, reports to, and is held accountable by, a governing group.

3.13 international norms of behaviour

expectations of socially responsible organizational behaviour derived from customary international law, generally accepted principles (3.21) of international law, or intergovernmental agreements that are universally or nearly universally recognized

NOTE 1 Intergovernmental agreements include treaties and conventions.

NOTE 2 Although customary international law, generally accepted principles of international law and intergovernmental agreements are directed primarily at states, they express goals and principles to which all organizations (3.15) can aspire.

NOTE 3 International norms of behaviour evolve over time.

[SOURCE: BS EN ISO 26000:2010, 2.11]

3.14 member stakeholder

stakeholder (3.27) who has a legal obligation or defined right to make decisions in relation to the governing body (3.11), and to whom the governing body is accountable

NOTE 1 These rights or obligations are often recorded in the organization's (3.15) constituting documents, laws and/or regulations.

NOTE 2 Decisions can include, for example, the determination of the composition of the governing body or the parameters within which the governing body is to make decisions.

NOTE 3 Governing bodies are accountable to these stakeholders for the organization's outcomes as well as the governing body's performance.

NOTE 4 Member stakeholders are often referred to, and can include, shareholders and members of an organization.

3.15 organization

person or group of people that has its own functions with responsibilities (3.23), authorities and relationships to achieve its objectives

NOTE The concept of organization includes, but is not limited to, sole-trader, company, corporation, firm, enterprise, authority, partnership, charity or institution, or part or combination thereof, whether incorporated or not, public or private.

[SOURCE: BS ISO 37301:2021, 3.1, modified — Note 2 to entry has been deleted]

3.16 organizational entity

organization (3.15) that has a distinct and independent existence

NOTE In some cases an organizational entity can be a legal entity

3.17 organizational purpose

organization's (3.15) reason to exist that is an optimal strategic contribution to the long-term wellbeing (3.30) of all people and planet

NOTE 1 The organizational purpose encodes the ultimate value the organization intends to generate for specified stakeholders (3.27).

NOTE 2 The organizational purpose guides the performance objectives and provides clear context for daily decision making by relevant stakeholders.

NOTE 3 The organizational purpose is an optimal strategic contribution to long-term wellbeing for all people and planet (sustainability) rather than just a justifiable contribution.

3.18 organizational resilience

ability of an organization to absorb and adapt in a changing environment

3.19 organizational values

beliefs about desirable outcomes or actions defined by the organization (3.15) as good and important, to be explicitly or implicitly shared and applied by the organization

3.20 precautionary principle

principle (3.21) of decision-making that stipulates that lack of full scientific certainty does not postpone implementation of effective measures to mitigate against threats of serious or irreversible damage to the health of social and environmental system

NOTE Effective measures are actions which take a long-term approach and which might anticipate changes on the basis of scientific knowledge.

3.21 principle

fundamental truth, proposition or assumption that serves as foundation for a set of beliefs or behaviours or for a chain of reasoning

[SOURCE: BS 13500:2013, 2.14, modified]

3.22 reference stakeholder

stakeholder (3.27) to whom the governing body (3.11) has decided to account to when making decisions pertaining to the organizational purpose (3.17)

NOTE 1 For example, scientific advisory board to a research organization, parents of the pupils in a school, community advisory boards for companies.

NOTE 2 In some cases a member stakeholder (3.14) can also be a reference stakeholder.

3.23 responsibility

obligation to act and take decisions to achieve required outcomes

[SOURCE: BS ISO/IEC 38500:2015, 2.22]

3.24 social impact

relevant and significant change in social value or outcomes to the extent caused by an activity

NOTE 1 Changes in wellbeing, and therefore in social value, outcomes or impact, can be positive or negative.

NOTE 2 Changes in wellbeing may arise indirectly, for example, from environmental changes.

[SOURCE: BS 8950:2020, 3.4]

3.25 social responsibility

responsibility (3.23) of an organization (3.15) for the impacts of its decisions and activities on society and the environment, through transparent and ethical behaviour (3.7) that:

- contributes to sustainable development (3.29), including the health and the welfare of society;
- takes into account the expectations of stakeholders (3.27);
- is in compliance (3.3) with applicable law and consistent with international norms of behaviour (3.13); and
- is integrated throughout the organization and practised in its relationships

NOTE 1 Activities include products, services and processes.

NOTE 2 Relationships refer to an organization's activities within its sphere of influence.

[SOURCE: BS EN ISO 26000:2010, 2.18]

3.26 social value

wellbeing (human) in the short term and long term

[SOURCE: BS 8950:2020, 3.6]

3.27 stakeholder

entity that can affect, be affected by, or perceive itself to be affected by a decision or activity

NOTE 1 Stakeholders can include member stakeholders (3.14) reference stakeholders (3.22) and other stakeholders, including customers, regulators, suppliers, employees and nature.

NOTE 2 In ISO management system standards, a stakeholder can be referred to as an "interested party".

[SOURCE: BS ISO 37301:2021, 3.2, modified – The term "interested party" has been deleted. Notes 1 and 2 to entry have been added]

3.28 sustainability

state of the global system where the needs of the present are met without compromising the ability of future generations to meet their own needs

NOTE 1 *Environmental, social and economic aspects are often referred to as the three pillars that underpin the achievement of sustainability. These interact and are interdependent.*

NOTE 2 *Sustainability is the goal of sustainable development (3.29).*

NOTE 3 *The satisfaction of needs results in wellbeing (3.30).*

NOTE 4 *Sustainability can be treated as an expression of the ultimate goal ('meta-purpose') of society as a whole.*

NOTE 5 *Sustainability, as a goal, has three components:*

- a) *meeting needs and therefore achieving wellbeing;*
- b) *achieving this for everyone and not just a few; and*
- c) *achieving this over the long-term, for future as well as current generations.*

NOTE 6 *Wellbeing can be extended to relate to non-human beings and systems.*

[SOURCE: ISO Guide 82:2019, 3.1, adapted]

3.29 sustainable development

development that meets the needs of the present without compromising the ability of future generations to meet their own needs

NOTE *Sustainable development can be treated as an expression of the broader expectations of society as a whole regarding how to meet its ultimate goal (meta-purpose) of sustainability (3.28).*

[SOURCE: BS EN ISO 26000:2010, 2.23. Note has been modified]

3.30 wellbeing

positive state of being where current and future needs are met, such that there is the capacity and opportunity to flourish

NOTE 1 *Wellbeing is also referred to as "flourishing" or a "good life".*

NOTE 2 *Wellbeing exists at the individual, household, country and global level and can be applied to people and nature, and to individuals and systems.*

NOTE 3 *Wellbeing can be assessed by subjective and objective measures.*

NOTE 4 *Wellbeing can be achieved on varying timescales and to varying degrees.*

NOTE 5 *Sustainable development underpins the achievement of wellbeing for all people and planet.*

[SOURCE: BS 8950:2020, 3.7, adapted]

3.31 wise

having or showing experience, knowledge, and good judgement towards achieving long-term wellbeing of all people and planet