

**STRATEGISING FOR SUSTAINABILITY: MEASUREMENT AND
VALIDATION THROUGH AN APPLIED CASE STUDY**

ABSTRACT

The purpose of this research was to investigate if the Strategising for Sustainability Index (SSI) tool could be applied in practice with the use of practitioner validated measures. The SSI tool is theoretically founded in the literature on sustainability and strategising however, there is no empirical research that supports its validity and application in practice. This article seeks to address this gap. For this, a target company was identified; a listed company ranked 39th on the JSE ALSI (March 2011). The target group were managerial practitioners on all levels, across divisions, involved in company strategising. Practitioners were asked four questions namely; How supported is each element as a measurement/indicator to determine sustainability strategising in a company? How embedded is each element on the SSI tool in Growthpoint's strategising? How do you agree with the researcher's SSI rating score of the organisation for each element? Considering all the elements for strategising for sustainability, how would you rank them? The process relied on facilitated guidance, participant observation and a documentation method involving a post-mortem analysis process. The ten elements of the SSI tool for determining sustainability embeddedness in strategy for a company were rated and found somewhat to highly supported as indicators. Practitioners were able to identify elements of the SSI tool that were embedded in their company's strategising for sustainability. Practitioners revealed agreement for the measures and the application of the SSI tool relative to the researcher view. Practitioners identified Specific Measures and Targets for sustainability to be the most important element of the SSI tool for embedding sustainability. The findings confirm the SSI tool elements as measures for sustainability embeddedness in strategising. The SSI tool can be rated and elements are incorporated into strategising. The SSI tool measures embeddedness and practitioners can obtain direction from results.

Key words: Sustainability, Strategising, Measurement, practice

INTRODUCTION

The sustainability movement is near its tipping point. Seventy percent of executives surveyed in a recent study said that their companies have made sustainability a 'permanent fixture on the management agenda'. The Boston Consulting Group and MIT Sloan Management Review surveyed data from more than three thousand corporate leaders in a hundred and thirteen countries and on twenty nine in-depth interviews with industry experts and academic scholars. It was found that, two thirds of respondents said management attention to, and investment in, sustainability has increased in the last year (2010-2011). Additionally, two thirds of companies said that sustainability is 'necessary to being competitive in today's marketplace' (Haanaes, Reeves, Von Streng Velken, Audretsch, Kiron, & Kruschwitz, 2012:1). On this point, some authors have suggested that sustainability is vital for companies to 'survive' and 'thrive' (Adams & Frost, 2008:289; Bonn & Fisher, 2011:5)

To truly prosper, corporate leaders need to 'move with the culture' (Trendwatching, 2010; Laszlo & Zhexembayeva, 2011:18). Sustainability, the new media and business buzzword yields twenty eight million results when a Google search of the term is conducted. But more than that, sustainability is creating a permanent shift in the very nature of business (Crews, 2010:15) and is considered more than just a trend (Bonn & Fisher's, 2011:14). The movement by leading businesses is to embed sustainability into corporate strategising. They are motivated by sustainability's connection to performance and profits (Haanaes, *et al.*, 2012:1).

Some of the benefits associated with sustainability embeddedness include the building of a strong positive corporate brand, employee retention, cost savings, enhanced innovation and sales (Adams & Frost, 2008:299; Cowan, Dopart, Ferracini, Sahmel, Merryman, Gaffney & Paustenbach, 2010:525; Hillestad, Xie & Haugland, 2010:441; Bonn & Fisher, 2011:5).

Embedding sustainability is a company's response to a radically different market reality and business dimension, one that unifies the profit, ecological and social spheres in a single integrated value creation space (Laszlo & Zhexembayeva, 2011:2). The head of strategy and environment at a corporate emphasised the impact of embedding sustainability into strategising. He postulates that it 'allows us to continue to profit and grow, it helps us to be a responsible business and it is crucial for our competitive advantage.' (Haanaes, *et al.*, 2012:1).

Studies indicate the 'here-to-stay' nature of sustainability for organizations everywhere. Those companies that are enjoying the profit and performance benefits of embedded sustainability have, at a much higher rate than other companies, changed their organisational structure, their business models and their operations to support more sustainable business practices (Haanaes, *et al.*, 2012:1). Companies acclaiming to be enjoying the profit benefits associated with sustainability tend to all have a distinctive organisational mindset and design that supports sustainability. Compared to other businesses, the leaders are three times more likely to have a business case for sustainability. They are also fifty percent more likely to have CEO commitment to sustainability, twice as likely to have a separate sustainability reporting process and twice as likely to have a separate function for sustainability. They are also fifty percent more likely to have a person responsible for sustainability in each business unit and more than two and half times as likely to have a chief sustainability officer (Haanaes, *et al.*, 2012:1; Sustainable Business, 2012).

Literature supports the process of embedded sustainability into strategising by offering various models, suggestions and tools for leadership in their role of strategising (Lacy *et al.*, 2009:489; Reilly, 2009:33; Quinn & Dalton, 2009:21; Searcy, 2009:50; Holton, Xie & Haugland, 2010:152; Crews, 2010:17; Elmualim, Shockley, Valle, Ludlowb, Shah, 2010:58; Leon-Soriana, Munoz-Tirress & Chalmeta-Rosalen, 2010:249; Bonn & Fisher, 2011:6). This is to be expected given its importance and connection to profit and performance. The tools and models are of such a quantity

that practitioners and experts are feeling 'overwhelmed' by the information on sustainability and are in search of practical frameworks and tools to measure their sustainability embeddedness (Klaine & Von Hauff, 2009:520).

Efforts to harness the benefits of sustainability, secure and assure stakeholders and protect company reputation has resulted in firms using to their most public and global form of communication; their websites (Coupland, 2005:256; Bowers, 2010:250). Research indicates a significant rise in the use of corporate websites for reporting Triple Bottom Line (TBL) activities amongst companies attempting to acknowledge and respond to changing local, national and global societal expectations concerning business practices (Lee *et al.*, 2009:141). In 2007 two thirds of the Global Fortune 500 corporations issued a form of stand-alone, non-financial report addressing sustainability issues (Reilly, 2009:33).

Riccaboni and Leone, (2010:131) relay that if companies are seeking to report on their strategising for sustainability, one may expect that there are some internal mechanisms which guide their activities towards this goal. This appears to be a challenge, many of reports have been criticized as mere 'public relations stunts' or 'empty talk' (Bowers, 2010:250; Uusi-Rauva & Nurkka, 2010:301). This coincides with concerns that these external communication mechanisms are not actually aligned with management's agenda, leading to the premise that, external communication mechanisms are not actually integrated into the company existing strategy and structure (Klaine & Von Hauff, 2009:520; Reilly, 2009:33; Hillestad *et al.*, 2010:440).

The sustainability movement may be at its tipping point however, academics and practitioners are of the opinion that sustainability has more ground to gain. While sustainability has made it onto many management agendas, responses from the Boston Consulting Group and MIT Sloan Management Review also indicate that it ranks just eighth in importance among other agenda

items. This could be on account of many companies 'still struggling to define sustainability in a way that is relevant to their business' and managers feeling overwhelmed and distracted by the 'daily grind of business' (Smith & Sharicz, 2011:74; Velazquez, Esquer & Munguia, 2011:36; Haanaes, *et al.*, 2012:1).

The key organisational features and actions of embedded sustainability strategies are not always clear or absent amongst sustainability company reports, stated vision and mission statements, corporate communication messages. The concerns surrounding the embeddedness of sustainability in strategising are raised in reference to the internal structures and practices of organisations. Managers have even come forward to declare the concept of embedding sustainability in strategising to be both 'complex' and 'elusive' (Elmualim, Shockley, Valle, Ludlowb, & Shah, 2010:58).

There appears to be a gap between the official declarations of companies (the talk) and actual organisational behaviour through execution (the walk) - that is lagging behind (Riccaboni & Leone, 2010:130). An implementation gap brought to attention by the criticism of external and publically available communication, coupled by manager's challenges in integrating sustainability into strategising. This raises questions of; Is there a link between the critics of reporting and the cries of management? Could the lack of strategic focus in reporting have to do with manager's inability to embedded sustainability into strategising on a daily basis?

KEY FOCUS OF THE RESEARCH

Sustainability is no longer a question of 'if' but rather a question of 'how?' Organisations have started incorporating sustainability into their vision and goals but whilst noises are being made, implementation is suspect. To address the gap, the researcher's propose a framework for a SSI

tool which measures the embeddedness of sustainability in strategising (see Table 1). In the development of this tool, a literature study was conducted on all literature pertaining to these search terms; 'sustainability,' 'strategy,' 'strategising,' 'integration of sustainability,' 'triple bottom line,' 'reporting,' 'sustainability measurement' and 'corporate social responsibility.' Then a content analysis was executed by the researcher on criteria set out for inclusion. The purpose was to identify key elements for the SSI tool to measure the extent to which companies' sustainability was embedded in sustainability. The research considered three broad concepts: compliance, strategy formulation and strategy implementation. Two elements for compliance were identified and four elements for strategy formulation measurement and four elements to measure strategy implementation. The element titles and criteria were sourced from the content analysis. Support was found for each element. The SSI tool was created to describe the status of strategising for sustainability and to determine if there was any evidence that sustainability was embedded into strategising amongst the ALSI Top 40 companies. The SSI tool was applied to publically available documents and information. The SSI tool presents sufficient measurement criteria for determining sustainability embeddedness given that its elements were derived from literature tools, models and sources on the topic of sustainability and strategising. The same key factors provided to practitioners to aid the process of embedding sustainability into strategising were used as measurement criteria in the research.

To support the research in determining the sustainability embeddedness – the researcher utilised a measurement criteria document. This document incorporated the 5 point scale on which company's sustainability embeddedness was measured in each element of strategising. The SSI was found to have discriminating value for determining strategising for sustainability embeddedness, in fact, the SSI tool was able to address the potential 'superfluous' claims surrounding sustainability and put into perspective those companies who have successfully

demonstrated that sustainability is not just for reputation purposes and that it is part of their strategising and operating as a listed company.

Smith and Sharicz (2011:76) posed the question of how it is possible for organisations to demonstrate that their sustainability declarations are not just 'good looks'? The researchers believe that the SSI tool addresses this challenge and supports managers in the following ways:

- **Addressing strategising gaps and better informed decision making:** knowledge of the communicated level of embeddedness in strategising affords management the opportunity to evaluate the strategising for sustainability process internally and ensure it is aligned with what is communicated. The findings afford management the chance to make future informed decision making on strategising and on the communication to stakeholders.
- **Improvement of communication strategy:** Awareness of the status of one's company offers a basis to improve or redesign the existing communication, reporting processes, marketing and corporate website design to project sustainability embeddedness as opposed to ad hoc sustainability claims and implementation efforts.
- **Company benchmarking:** The Top 40 leading companies on the JSE were benchmarked on the embeddedness of strategising. The information that companies are measured on, is their external communication that is relayed to investors. With this information, management is able to model a framework for the company to address the elements that the company do not achieve on. Their motivation to be aware of weak areas is so that improvements can be made to attract the socially responsible investor.
- **Sustainability investing:** the benchmarking quality of the SSI tool affords investors comparability and the ability to discriminate between companies to invest in. Investors who want to ensure the sustainability embeddedness and longevity of a company' strategising can interpret the level with this SSI tool.

- **Holistic sustainability measurement:** the SSI tool was formulated on literature on the topic as well as an incorporation of best practice for sustainability. Measurement criteria included these and as such, the level of sustainability embeddedness of a company that was determined provides management with a holistic picture of sustainability in strategising as communicated.
- **Quick access to information:** This SSI tool can be used without internal investigation and access to restricted strategies and policies. It can be used with easily accessible publicly available communication. It doesn't require confidential information. Managers who want the year on year results of their level of sustainability embeddedness in public communication can acquire outside skills for application of the tool without disruption of day to day activities.
- **Discriminating quality of SSI tool:** the SSI tool contextualises sustainability within strategising and provides a level of embeddedness. This offers management the ability to determine the sustainability embeddedness level of their company in a way that is different to the current indexes and market capitalisation rankings.

As a result of the potential of the SSI tool, the following future research was proposed:

'It is recommended that future research address and further investigates the implementation gap between what is said and what is done. Future research should make a comparison between what was communicated publically (the level of strategising for sustainability determined by the researcher on the SSI tool) and what is actually occurring in the JSE ALSI Top 40 companies. A thorough internal analysis of a case company could support the making of the SSI tool and provide greater insight into the implementation gap. The research could also serve to reveal the reasons for a company's strategising for sustainability embeddedness rating by assessing how practitioners rate, rank and support the level of sustainability embeddedness in elements of strategising. Further research could seek to challenge the legitimacy of sustainability claims by determining on the ground ratings for embeddedness of sustainability'

To expand on the development of this SSI tool, research needs to be conducted on its ability to be applied in practice. While this research describes the SSI tool shortly, it mainly investigates the SSI tool's application within an organisation to determine its validity for use in practice.

This research, therefore, addresses the implementation gap through the application of the SSI tool to a case company. Literature encouraged clarifying if and to what extent sustainability forms part of 'management's agenda' and strategising. For this, a sample of practitioners was investigated in search for the embeddedness of sustainability within internal structures. The following research questions were asked; 'Can the Strategising for Sustainability Index (SSI) tool be supported in practice?' This leads to questions of whether 1) elements contained in the SSI tool can be rated by practitioners and if they are in fact 2) incorporated into strategising. The research aims to determine the level of support by practitioners for the SSI tool, asking if 3) practitioners support the SSI as a means of measurement of sustainability embeddedness? Finally we ask, 5) if practitioners can obtain direction from results.

BACKGROUND TO THIS RESEARCH: CONTEXT AND THEORY

Many firms claim to be focused on a sustainability agenda however, when digging deeper and through informal investigation, it appears as if many of these claims often have little substance – not much more than talk or sometimes lacking real intent.

Sustainability has become a boardroom-level strategic business issue associated with business's ability to 'survive' and 'thrive' (Adams & Frost, 2008:289). In fact, there is consensus that the 'case for change' (referring to sustainability's place in strategising) has been successfully made (Skinner

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& Mersham, 2008:239; Lacy, Arnott & Lowitt, 2009:485; Lee, Fairhurst & Wesley, 2009:2; Crews, 2010:15; Elmualim *et al.*, 2010:58).

Whilst the case for change is made, executives express a lack of skills, awareness and knowledge adequate to meet this challenge (Crews, 2010:17). Kane, (2011) put forward that the radical transformation that is required of businesses (in terms of sustainability) cannot possibly be driven by environmental managers hidden away in their environmental silos.

Literature highlights the challenges and suggests that to address the sustainability of business there is a need to understand its connection to strategising. White, (2009:386) emphasises this relationship with the article title: 'Building a Sustainability Strategy into Business'. The key is to build sustainability into the business strategising (Lacy *et al.*, 2009:484). Bonn and Fisher, (2011:6) suggest that for businesses to be more sustainable, they need to ensure that sustainability is integrated into the strategy process from the beginning and on an ongoing basis. This notion highlights the need to look at strategy from a practitioner's level, within organisation, and identify the 'detailed aspects of strategising' (Jazarbowski & Spee, 2009:69).

Sustainability theory has provided leadership with various tools for embedding sustainability into strategising (Klaine & Von Hauff, 2009:520; Riccaboni & Leone, 2010:131; Bonn & Fisher, 2011:6). The Five Levers Framework is one such tool which is used by high performing companies and aspires to generate impressive business value by executing sustainability strategies (Lacy *et al.*, 2009:489). Business leaders can use the tool to address the elements within the business to achieve the goals of strategising for sustainability. It is suggested that successful companies make organisational changes such as altering business processes to maximise the value generated by their sustainability efforts. Another tool providing guidance on embedding sustainability in strategising is the model titled: 'sustainability as an integral part of strategy.' It promotes

sustainability integration by means of discussing each element in the model with regard to sustainability embeddedness (Bonn & Fisher, 2011:6).

Other suggestions to help firms embed sustainability are; incorporating it into the balanced scorecard card (BSC) and embarking on a sustainability performance measurement (Searcy, 2009:50). Although initially developed for the purpose of linking strategic goals in its four dimensions to the financial bottom line and increasing business profitability, most research considers the tool suitable for the management of sustainability and CSR. The BSC has been found to not be a tool for the formulation of strategies but part of a wider competitive positioning. Leon-Soriano *et al.*, (2010:249) propose a Sustainability Balanced Score Card (SBSC) that takes into account the 'human' and 'green' cases in order for the company to act according to all three elements of TBL. This is so that they can offer a framework to include the necessary steps to grant the integration of sustainability.

Literature has provided suitable tools for aiding practitioners to embed sustainability into either strategy formulation or implementation or both. The challenge indentified in the process of embedding sustainability is that in spite of the extent of support offered, the desired outcome of sustainability embeddedness is not always be achieved. Leaders are 'still struggling to define sustainability in a way that is relevant to their business' and are feeling overwhelmed and distracted by the 'daily grind of business' (Smith & Sharicz, 2011:74; Velazquez, Esquer & Munguia, 2011:36; Haanaes, *et al.*, 2012:1). Practitioners express that in spite of the frameworks, tools and models provided, the goal is 'complex' and an 'elusive' one (Elmualim *et al.*, 2010:58).

Despite the powerful forces for corporate sustainability - including global pressure, informed leadership, available tools and frameworks, and clarity on the sustainability business argument - a focus on sustainability may be impeded by equally strong forces against its implementation (Klaine

& Von Hauff, 2009:520; Reilly , 2009:33; Hillestad 2010:440). Strategising for sustainability is not a trivial task (Holton *et al.*, 2010:152). Research linking corporate strategic change and sustainability has identified some counter forces to implementing corporate sustainability initiatives (Reilly, 2009:35).

Besides leadership's challenges with embedding sustainability in strategising, various stakeholders have raised concerns pertaining to the actions taken by organisations in communicating their sustainability goals. The legitimacy of sustainability claims on corporate websites have been criticised both inside and outside of corporate walls (Coupland, 2005:256; Bowers, 2010:250). These internal and external concerns emphasise that the concept of sustainability may not be successfully embedded in the 'doing of strategy' (Jazarbkowski & Spee, 2009:69).

There appears to be a gap between the official declarations of companies and actual organisational behaviour (Riccaboni & Leone, 2010:130). As a result of leadership's struggles with the embedding of sustainability in business strategising and the concerns over the legitimacy of sustainability external communication, the research focus on these topics has shifted to a more practice approach (Riccaboni & Leone, 2010:130). Literature presents some case study approaches to studying the sustainability and strategising. The case studies were on various case companies across different industries. The purposes of the studies applying case research methodology included were: 'To investigate how the leaders incorporate sustainability in the precast industry were managing for sustainability,' (Holton, 2010:154) 'To explore if and how management control systems (MCS) have a role in implementing sustainable strategies' (Riccaboni & Leone, 2010:130) and 'To present a case study of how a global consumer company, with over 300 brands sold in 180 countries, and 138,000 employees, is building sustainability into the rhythm of its business.' (White, 2009:386).

These studies motivated for case study approaches and in some cases, single case design on the basis that it is a suitable research methodology for types of explanatory questions focusing on contemporary events (Yin, 2003) and because researchers made observations that case studies offer the possibility of understanding the nature of the study in practice, both in terms of techniques, procedures, systems which are used and the way in which they are used (Scapens, 2002; Riccaboni & Leone, 2010:130).

With specific reference to Social and Environmental Accounting related research, many scholars (Gray, 2002:697; Adams, 2004; Parker, 2005) called for further employment of case and field studies ie: research that was more engaged with practice. Adams and Larrinaga-González, (2007:333) found that the 'extant literature on sustainability accounting and reporting, in contrast to management accounting and management, has largely ignored practice within organisations'. Moreover, Owen (2008:248) argued that fieldwork studies have great potential in going beyond the analysis of the contents of official statements and reports, as well as in understanding organisational processes and managerial motivations underpinning reporting initiatives and evaluating their effectiveness in promoting organisational transparency and accountability (Riccaboni & Leone, 2010:130). Lee *et al.*, (2009:141) note that there is little research investigating the degree to which companies detail triple bottom Line (TBL) initiatives publically or into the level of sustainability in strategy formulation and implementation.

Before proceeding, it is critical to define the key constructs of this research. *Sustainability* creates long term shareholder value by taking up opportunities and managing associated risks that derive from TBL (economic, environmental and social) developments (Crews, 2010:15; Elmualim *et al.*, 2010:59) and is often mentioned in association with responsible leadership, the use of resources and corporate social responsibility. *Sustainability claims* on the other hand are distinctive remarks, marketing labels and brands, developed by public and private sector institutions (UNCTAD, 2011)

Strategising For Sustainability: Measurement And Validation Through An Applied Case Study about sustainability achievements and projects. They are generally communicated through websites, public documents and with products and services. They attest that the company itself, its products and supply chains incorporate the pillars of sustainability (economic, social and environmental). *Strategising* – the process of formulating and implementing a strategy by practitioners (Hodgekinson & Clarke, 2007:243). The interest of strategising is how initiatives (practices and praxis) are approached and resources applied to eventually achieve competitive advantage.

Through reviewing the literature, sustainability embeddedness in strategising was proposed in the SSI tool. Ten elements are put forward as components and determinants in the SSI tool. Two of which measure compliance, four measure strategy formulation and four elements measure strategy implementation. Together the three categories form the SSI tool for determining sustainability embeddedness in strategising. Table 1 and Figure 1 show the detail and measurements for each elements contained in the SSI tool. These categories and elements of sustainability embeddedness used in the SSI tool were determined from literature are described in Table 1. The case company was evaluated based on this tool.

Table 1: The SSI Tool categories, elements, descriptors and supporting authors as applied to target companies

ELEMENT NUMBER AND TITLE:	DESCRIPTION OF ELEMENT:	SUPPORTING AUTHORS:
COMPLIANCE:		
1. INTEGRATED REPORTING	<ul style="list-style-type: none"> A product of a process or system of processes that seeks to inform stakeholders of an organisations ability to heed to stakeholder and or societal concerns and to provide meaningful performance information to support assertions suggesting effective management. To demonstrate how well an organisation has embedded a comprehensive view of sustainability into the strategic fabric of the organisation that leads the reader to understand whether the organisation is well placed to adapt to economic, social and environmental factors. The users of an organisation's integrated report (the stakeholders) should be able to determine from the report whether the organisation has sufficiently applied its collective mind in identifying the social, environmental, economic and financial issues that impact on the organisation's business, and whether these issues have been appropriately incorporated into its strategy. Reporting ranges from mere compliance, disclosure and the acknowledgement of sustainability to a fully integrated annual and sustainability report called an Integrated report The accessibility of the report demonstrates a willingness to disclose information Excellent reports consider: KING III, Global Reporting Initiative (GRI) Standards, UN Global Compact, JSE SRI Index, and the ISO 2600 sustainability reporting and performance frameworks and communicate a balance of TBL sustainability indicators 	Bowers, 2010:250 Coupland, 2005:256 Dawkins & Ngujiri, 2008:236. Gill, Dickinson & Scharl, 2008:244 Ince.motiv, 2010:18 Rolland & Bazzoni, 2009:249 Smith & Sharicz, 2011:78 Sustainability Services, (2011). Uusi-Rauva & Nurkka, 2010:300 Velaquez et al.,2011:36
2.	<ul style="list-style-type: none"> Recognition by third parties can be through endorsements, awards, partnerships 	ACCA

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<p>SUSTAINABILITY RECOGNITION AND AFFILIATION:</p>	<p>and affiliations</p> <ul style="list-style-type: none"> • Companies that are confident in their efforts towards sustainability embeddedness seek connections with other leading organisations that share the same beliefs and intentions • Awards include those such as 'responsible retailer of year' show a level of accountability for actions • Voluntary additional reporting such as the Carbon Disclosure Project CDP, display efforts to go beyond minimum reporting 	<p>Bonn & Fisher, 2011 Cowan <i>et al.</i>,2010:524; Ernst & Young Searcy, 2009:52 SRI Smith & Sharicz, 2011:78</p>
STRATEGY FORMULATION		
<p>3. VISION & MISSION INCLUDES SUSTAINABILITY</p>	<ul style="list-style-type: none"> • Vision and mission statements and the core values of a business are crucial to the formulation of strategy. • A sustainability embedded vision, mission and core values demonstrate the focus and intent of the organisation towards sustainability • A sustainability philosophy, statement from the CEO or a sustainability slogan does not demonstrate a high level of embeddedness and in fact can portray half heartedness by the company • All 3 elements of sustainability and the word itself are on the front page of the website and both in the annual report and the sustainability section. 	<p>Adams & Frost, 2008:288 Bonn & Fisher, 2011:6 Bowers, 2010:249 Carpenter & Sanders 2009:35 Coupland, 2005:356 Capriotti & Moreno, 2007:221 Leon-Soriana <i>et al.</i>, 2010:252 Lynch, 2009:490 Reilly, 2009:34 Searcy, 2009:52</p>
<p>4. RISK MANAGEMENT: MACROECONOMIC IDENTIFICATION OF RISKS AND OPPORTUNITIES</p>	<ul style="list-style-type: none"> • A connection between sustainability risks and company strategy formulation affecting strategic, operational and tactical decisions • Identifying the macroeconomic and industry risks and opportunities associated with sustainability • Companies that acknowledges the impact of climate change and social challenges and the role the company plays in achieving sustainability • A visible system to manage the risk including a model or clear plans. 	<p>Lynch, 2009:351 KING III Riccaboni & Leone, 2010:130 Searcy, 2009:50 Velaquez <i>et al.</i>, 2011:36</p>
STRATEGY IMPLEMENTATION:		
<p>5. PROGRAMMES & STAFF LEARNING</p>	<ul style="list-style-type: none"> • To harness the staff buy-in, companies need to train and educate employees on sustainability embedded company goals and educate them on their role in the desired outcome. • Staff are seen as critical to the success of a strategy and inasmuch, pivotal to one that incorporates sustainability • Employee engagement has an impact on company performance and embedding social and environmental considerations into the company's operations spurs engagement and the achievement of financial return and an embedded sustainability strategy • Learning and education are fundamental methods to communicate to staff the 'revolutionary' drive towards a shift to sustainability • Photos from sustainability awareness contract sessions, campaigns, drives, community outreach and formal training with staff demonstrate embeddedness of sustainability in strategising. 	<p>Elmualim <i>et al.</i>, 2010:58 Holton <i>et al.</i> 2010:157 Klaine & Von Hauff, 2009:520 Lynch, 2009:550 Laszlo & Zhexembayeva, 2011:20; Reilly, 2009:34 Lacy <i>et al.</i>,2009:491 Reilly, 2009:34 White, 2009:392</p>
<p>6. SPECIFIC GOALS AND OBJECTIVES TO ACHIEVE SUSTAINABILITY:</p>	<ul style="list-style-type: none"> • A firm's goals and objectives are commitments to actions to achieve the strategic vision of the company • These goals need to incorporate a sustainability focus • Sustainability embeddedness is determined through communicating specific sustainability statements that are visible to stakeholders • Clear goals such as 'we are committed to integrating sustainability into our strategy.' 	<p>Lynch, 2009:491 Lee <i>et al.</i>,2009:146 Riccaboni & Leone, 2009:36</p>
<p>7. CLEAR SUSTAINABILITY INITIATIVES AND PROGRAMMES</p>	<ul style="list-style-type: none"> • Actions and initiatives are tangible efforts that serve as evidence that a company has interacted with stakeholders and made a commitment of resources • The actions need to be aligned with corporate goals and vision and should not just be ad hoc projects • sustainability actions and projects display decision making in the direction of sustainability through the commitment of resources and capital outlay 	<p>Bonn & Fisher, 2011:7; Hallstedt <i>et al.</i>,2010:703 Holton <i>et al.</i>,2010:152 Riccaboni & Leone, 2010:36 Reilly, 2009:35</p>
<p>8. DEDICATED STAFF FOR SUSTAINABILITY</p>	<ul style="list-style-type: none"> • Good governance is essentially about effective leadership. Leaders need to define strategy, provide direction and establish the ethics and values that will influence and guide practices and behaviour with regard to sustainability performance. • For the achievement of a sustainable organisation, responsible leadership, are required to be change agents • Evidence of decision makers at senior leadership level portrays accountability and governance • Staff at middle and operational levels suggest sustainability is truly being implemented • Companies give special recognition to individuals and teams for sustainability • Implementation of a sustainability embedded strategy is evident from names/photos and titles of sustainability dedicated staff 	<p>Adams & Frost, 2008 Bonn & Fisher, 2011:12 Cowan <i>et al.</i>,2010:154 Holton <i>et al.</i>,2010:152 KING III Klaine & Von Hauff, 2009:520 Lynch, 2009:492 Quinn & Dalton, 2009:21 Reilly, 2009:34 Uusi-Rauva, 2010:300 White, 2009:329</p>
<p>9. SPECIFIC MEASURES AND TARGETS:</p>	<ul style="list-style-type: none"> • Companies that communicate specific measures and targets for sustainability portray embeddedness of sustainability in the implementation of strategy. • The disclosure of successes or failures towards set goals and objective on a year on year basis shows progressive improvement. • Targets and Measures indicate a commitment to sustainability • performance management systems e.g.: Balanced Score Cards and Key Performance Indicators for sustainability targets • Companies that use both qualitative and quantitative means to describe the achievement on efforts towards sustainability reveal embeddedness 	<p>Adams & Frost, 2008:29 Bonn & Fisher, 2016 Holton <i>et al.</i>,2010:152 KPMG, 2008 Lacy <i>et al.</i>,2009:491 Leon-Soriano <i>et al.</i>, 2010:249 Quinn & Dalton, 2007:21 Reilly, 2009:41 Riccaboni & Leone,</p>

10. SUSTAINABILITY INNOVATION:	<ul style="list-style-type: none"> • Sustainability innovation encapsulates the ability of the company to allow for sustainability to inform strategy decisions. • Innovation, fairness, and collaboration are key aspects of any transition to sustainability embeddedness – innovation provides new ways of doing things, including profitable responses to sustainability. • The cost of implementing sustainability is a chief barrier to the adoption. Costs including; capital outlay, additional resources, time and the costs of certification where applicable. Leaders are hesitant to make an economic outlay in the short term in spite of the opportunities and often tangible return on investment e.g.: energy efficiency savings • Companies that are able to turn their business inside out find that addressing sustainability issues can change go from being a burden or cost to an opportunity for efficiency and profit • Businesses who demonstrate innovative thinking in such a way that their understanding of the concept of sustainability informs products, services and processes • Mainstream consumers want products that are more affordable, better-performing, healthier, longer-lasting, with added appeal – in other words, it is 'smarter' rather than greener or more responsible, that they are after. • The creation of business plans and decision framework models demonstrate how sustainability forms part of strategising • Confident statements such as; 'sustainability elements are built into how we do business and our decision making.' 	2010:130 Smith & Sharicz, 2011:73: Searcy, 2009:50 Bonn & Fisher, 2011:11 Collins et al., 2007:736. Holton et al., 2010:157 KING III Laszlo & Zhexembayeva, 2011:20 Smith & Sharicz, 2011:75 Setthasakko,2009:169
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The research identified that literature was able to provide support for the creation of the SSI tool and the tool's application showed an ability to discriminate companies on the JSE ALSI Top 40 (South African Bourse) for the level of embeddedness of sustainability in strategising activities when applied by a researcher.

Leading on from the development of the SSI tool, this research poses the following investigative questions; Can the proposed SSI tool be supported in practice? Can practitioners rate the elements? Are the elements of strategising incorporated into the doing of strategy? Do practitioners support the measurement tool and can direction be derived?

These questions aspire to deliver insight and the ability to comment on the gap between what is communicated externally and the internal practices of sustainability embeddedness. Given the call for case study methodology in this field and the purpose of this research, the research propose case study design to address further research. The case company selected (convenience sample) for this research was; Growthpoint Properties in South Africa (Growthpoint). They are a listed company ranked 39th on the JSE ALSI Top 40 and their level of sustainability embeddedness in strategising was measured as 34 out of 50 upon application of the SSI tool. This case company

was investigated for their sustainability embeddedness in strategising based on their external and publically available communication.

This research, takes a case study approach to investigate the internal strategising of Growthpoint Properties with the intention to challenge support (or not) for the SSI tool and to comment on the implementation gap between what is said and what is done.

CONTEXT FOR DELINEATION OF SUSTAINABILITY EMBEDDEDNESS IN STRATEGISING

The notion that there is a complementary relationship between strategising and sustainability is supported in the literature by several authors (Collins, Lawrence, Pavlovich & Ryan 2007:729; Hallstedt, Ny, Rovert & Broman, 2010:704). Bonn and Fisher (2011:5) highlight and emphasise the connection by suggesting that sustainability is in fact the 'missing ingredient in strategy.' They stress that a proper understanding of the relationship between strategy and sustainability is crucial in gaining a sustainable competitive advantage in the twenty first century.

Companies have responded to this shift by creating sustainability management positions, resulting in the increased complexity of strategising (Kane, 2011). These managers have described sustainability strategies as a complex process (Crews, 2010:17). Companies' sustainability efforts are further driven by society, who offer support for companies' sustainability efforts and puts pressure on those who do not take strides towards transparent initiatives (Lacy *et al.*, 2009:485).

Strategising for sustainability refers to embedding sustainability in strategising and the alignment of sustainability initiatives with short and long term business decisions. This concept is emphasised in the latest governance report, the KING III, which states that 'Strategy, risk, performance and sustainability have become inseparable' (Ince.motiv., 2010). This statement

emphasises the connection between company performance, strategising and sustainability and lends support for investigation into the practices of strategising for sustainability.

Strategy is the coordinated means by which an organisation pursues its goals and objectives (Carpenter & Sanders, 2009:35). Leaders identify risks and opportunities from internal and external sources and include an analysis of industry and macro environment. Strategy formulation, the process of deciding what to do, involves the formulation of vision, mission, setting of goals and objectives and determining of sources of competitive advantage (Lynch, 2009:490).

Strategy implementation, the process of performing all the activities necessary to do what has been planned, encompasses formulating action plans, aligning organisational structure, setting systems and measures in place and rewards to achieve the firm's goals and objectives (Carpenter & Sanders, 2009:35; Lynch, 2009:490).

Strategising (strategy formulation and implementation) can be achieved through a prescriptive or an emergent approach (Lynch, 2009:6). The prescriptive approach to strategising involves deliberate planning by the firm, it is one where the objective has been defined in advance and the main elements have been developed before strategy commences (Lynch, 2009:37). Leaders are expected to devise thoughtful, informed and deliberate directives and decisions that will lead to achieving organisational goals. The leader is expected to 'know the way and show the way and go the way' (Crews, 2010:18).

The emergent approach strives towards an objective which is often unclear and whose elements are developed during the course of the strategising process. It suits fast developing markets as it considers the dynamic changes in the environment and adjusts to accommodate them, offering flexibility. Leaders are guided by strategic intent and the outcome is unknown (Lynch, 2009:225).

Most literature sources addressing strategising for sustainability identify it as being a continual process, a continuum towards an ultimate sustainability and business goal (Bonn & Fisher, 2011:12). The process is viewed as 'gradual, planned, continuous and ongoing incremental change' (Holton *et al.*, 2010:153; Smith & Sharicz, 2011:5; Velazquez *et al.*, 2011:41). The interest of this article leans towards the deliberate approach.

RESEARCH OBJECTIVES AND QUESTIONS

This research poses the following investigative questions; Can the proposed SSI tool be supported in practice? Can practitioners rate the elements? Are the elements of strategising incorporated into the doing of strategy? Do practitioners support the measurement tool and can direction be derived?

THE POTENTIAL VALUE-ADD OF THE RESEARCH

Hallstedt *et al.*, (2010:708) present that very few companies comply with a 'fully integrated' status of sustainability embeddedness in strategising. Smith and Sharicz, (2011:73) investigated the extent to which organisations have, in practice, begun to make the shift towards sustainability. Holton *et al.*, put forward the progress of an organisation towards becoming a 'sustainable organisation.' These authors have highlighted the concerns that sustainability and its integration with company strategy may be a seemingly 'elusive goal' for business leaders (Elmualim *et al.*, 2010:58). These concerns are amidst criticism of external communication, reporting and information put forward on corporate websites (Bowers, 2010:250; Uusi-Rauva & Nurkka, 2010:301).

The legitimacy concerning sustainability claims has highlighted an implementation gap. We applied the proposed SSI tool and measured the level embeddedness of the sustainability claims in strategising of the JSE ALSI Top 40 companies. The research was conducted through a process that involved interpretation by a single researcher. This research attests to further investigate the implementation gap through the application of the SSI tool. The research aim was to validate the tool's effectiveness in measuring the embeddedness of sustainability in company strategising.

RESEARCH DESIGN

Research approach

A conceptual analysis was applied to the SSI tool which contains the published works and proposed standards and frameworks on the topics of sustainability and principles of strategy. From the content used to design the measurement tool, ten elements (of sustainability) were identified to measure the degree to which sustainability was embedded in the process of strategy formulation and implementation. The SSI tool measures sustainability embeddedness.

The analysis began with identifying research questions and choosing research subjects. A sample of Growthpoint Properties staff members participated willingly. The object of this research was to answer the research propositions. For this a facilitation session was conducted with the subjects at Growthpoint Properties premises. The facilitation process was broken down in two stages with four instructions in the first stage and three instructions in second stage. The facilitator broke down the research content into meaningful and pertinent units of information and instructions. Implicit and explicit terms were explained and clearly defined by the facilitator to the practitioners before the beginning of the process. To limit the subjectivity in the definitions of concepts, a standard document with definitions was used to bring clarity.

Referring to the research design in Table 2, this research focused on investigating the practicality of the SSI tool.

Table 2: Research design components

Component	Description
Research question / problem	Is the proposed SSI tool valid (accurate and relevant as measurements) for application in practice?
Propositions	P1: SSI elements can be rated by practitioners P2: Practitioners support the SSI as a means of measurement of sustainability embeddedness P3: Elements are incorporated into strategising P4: Practitioners obtain direction from the results
Unit of investigation	Elements that make up sustainability embeddedness within the strategising of a company as measured by the SSI tool
Unit of analysis	Managers and staff involved with strategising for sustainability
Logic linking the data to the propositions	Practitioners in a 'typical' company can judge the measurements of elements for accuracy, relevance and utilisation. Their ratings in support (or not) can give direction to the usefulness of the SSI rating for practical application.
Criteria for interpreting the findings	1 Practitioners' independent ratings and ranking of each element (for relevance) 2 Practitioners' agreement about incorporation into strategising measurement 3 Practitioners' agreement about the 'researcher ranking' for each element 4 Practitioners' reasoning about action to increase embeddedness

Source: Own compilation based on the Yin, (2003:21) design

Key Scientific beliefs of the Researchers

To answer the above questions, the researchers were aware of their own methodological values, beliefs and particular philosophical assumptions. These assumptions could influence the way in which the research was conducted and are stated to understand the 'intellectual climate' in which the research was undertaken.

Ontological positions

This position states the researchers' views and the very nature and essence of research reality. Researcher A is an objective realist who believes that knowledge comes from facts associated with the case and the context. If repetitive and consistent conditions of sustainability claims are found in the Top companies, they can be generalised. His interest was to approach the research question from a strategy as practice view. Researcher B was tasked with a practitioner role in the creation of an organisation's sustainability strategy. She seeks the truth through objective judgement of best practices and scientific proof.

Epistemological positions

The theory of knowledge (epistemology) of the researchers diverged to some extent, allowing for interplay on how decisions on the social phenomena can be known and how knowledge can be demonstrated.

Researcher A primarily worked from both a scientific paradigm supported by a consultant paradigm. Working as a strategy consultant influenced the search for factual directives, business patterns and answers to existing situations of similar nature. Researcher B worked from an academic learning paradigm in order to meet the requirements for a Masters degree and simultaneously give guidance to the demands she faces as the person contributing to the development of a company's sustainability strategy.

Case study as a research strategy

Stake, (1994:244) suggests that a case study is useful when the 'opportunity to learn is of primary importance.' A case study approach provides a mode of inquiry for an in-depth examination of phenomenon. Yin, (1989:23) characterizes case study research as empirical inquiry that 'Investigates a contemporary phenomenon within its real life context; when the boundaries

between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used.' Yin, (2003) suggests the uniqueness of a situation as sufficient rationalising for using a single case and that the 'distinctive need' for case study research 'arises out of the desire to understand complex social phenomena.'

The researchers believe that given the nature, uniqueness and complexity of the relationship between sustainability and strategising – there is a need for case study research methodology. Literature has titled sustainability in every sense of the word, meaning and implementation – complex in nature. Strategising literature also communicates the complexity of strategising for organisations. For these reasons, the researchers desire to understand the relationship between these complex social phenomena's and as such, there is a distinctive need for a case study research approach, using a single case, into strategising activities and sustainability embeddedness.

Yin (1989:48) further argues that a single case design is warranted or appropriate on the basis the case is revelatory. A revelatory case is one for which there is a belief or assumption that the problems discovered in a particular case are common to other cases as well. If the chosen case study can serve as a revelatory case then there is basis for discovering and describing problems that may be common to other businesses struggling to embed sustainability into strategising (Yin, 1989:48).

Beyond the aspects of the development of the case study methodology - that makes this case company an interesting case - two other points suggest why this research was conducted by single case design. First, Stake (1994:237) describes three types of case studies, they are:

Intrinsic: the exploration of a particular case to gain a better understanding of it

Instrumental: a particular case is examined to provide information or insight on issues or the refinement of theory.

Collective: a number of cases are studied jointly in order to inquire into the phenomena, population or general condition

The researchers believe that this research can warrant a single case design given that it is revelatory by means of it fulfilling both intrinsic and instrumental purposes. The research question is: Is the proposed SSI tool valid (accurate and relevant as measurements) for application in practice? This research explores and describes the embeddedness of sustainability in strategising of a JSE listed company, utilising the experiences and judgements of those strategising: the practitioners. The SSI tool represents a tool with significant potential yet, better understanding into its ability to be applied in practice is necessary. Greater insight into the embeddedness of sustainability in strategising, through an internal analysis, presents an opportunity to provide information on the strategising processes for sustainability. This will also contribute to the researcher's ability to comment further, adding to theory and subject matter, on the implementation gap between what is said and what is done.

Given the case study company is a leader in their industry and amongst the JSE Top 40, the documenting and understanding of their embedded sustainability is valuable for its own sake, thus the research serves intrinsic purposes. In fact, the findings will be presented back to the case company for all round learning.

The research is instrumental to the extent that it will shed light on problems and issues that may be common to other listed companies on the JSE index. The research aims to produce evidence of strategising and a validated SSI tool for measuring the embeddedness of sustainability in strategising. The tool is utilised to describe and represent the embeddedness of sustainability of

this case company. The tool may have utility and be instrumental in investigations of other listed companies. Especially since the JSE Top 40 companies have had their external communication measured with the same tool – providing reason for further investigation and applicability of a validated SSI tool.

RESEARCH METHOD

Research setting and background

Leading up to the date and session planned for gathering data, a meeting invite was made for practitioners from Growthpoint Properties using MS Outlook. Practitioners were given the options to 'Accept' or 'Decline' attendance which represented consent to participate in the research. The following information was made available to the 17 practitioners prior to the session.

The session time slot was scheduled for the duration of 2 hours on the 5th of September 2011. The purpose of the workshop was communicated to the CEO and practitioners as; 'To investigate and evaluate the Strategising for Sustainability Index (SSI) allocated to the company and evaluate strategising actions currently used. The workshop will engage with staff members on the elements of strategising and integration of sustainability. The information from the session will give immediate feedback to decision makers and eventually form part of a master's thesis.' Practitioners were informed that an external strategy facilitator would be present and were provided with the following programme for the workshop:

1. Introduction of strategy consultant and workshop facilitator (outsider)
2. Introduction of the tool and the research process
3. Discussion on the topic
4. Collect input from practitioners on their views and opinions
5. Feedback on session

As part of the motivation to receive permission for this research, this outcome was offered as: 'An opportunity for staff to give their thoughts and input on the concept of strategising for sustainability. Staff were invited to participate and judge the measurement tool that was used in earlier research on the company's corporate strategising.

Sampling

Sampling method: The sampling method was a combination of convenience and purposive sampling.

Sampling frame: The target group were managerial practitioners on all levels involved in company strategising. Due to the busy schedules a convenience approach was taken in the inviting of attendees. The sample frame included Growthpoint Properties practitioners from various management positions including top, middle and other functional practitioners. The sample included members from across divisions and in line functions. It included members of the sustainability division counting the sustainability coordinator.

Sample size: Seventeen Growthpoint practitioners participated willingly. The sample consisted of professionals with practical experience in strategising for their company. This study aims to determine if the SSI tool can be supported in practice. This led to the obvious choice of testing the tool on those professionals involved in strategising. The sample includes a consistency of practitioners representing more than fifty percent of the population at the company directly involved in strategising. The sample size is further motivated by the monetary value of the time of each key practitioner in the sample. Key practitioners exchanged attention towards important business practices associated with the operating of the business for participation in the research. Increasing the number of the sample could have adversely impacted the case company.

Data collection methods

A qualitative research study imitating grounded theory for the literature search and a case study as inductive research approach that involves a focus group through action research was used. The data collection method was based on a modified process described by Bjornson, Wang and Arisholm (2008) to gather specific data to support (or not) the measurement tool. The method included the use of Post-It stickers (with responses) for documentation of responses. The process collected responses on participant rankings, agreement and ratings. It relied on facilitated guidance, participant observation and a documentation method on Post-Its.

The data was collected by asking the following questions:

Question 1: How supported is each element as a measurement/indicator to determine sustainability strategising in a company? 5 = highly supported. 1 = not at all supported.

Question 2: How embedded is each element on the SSI tool in Growthpoint's strategising? 5 = embedded. 1 = missing

Question 3: How do you agree with the researcher's rating score of Growthpoint for each element? What is your agreement rating? 5 = completely agree. 1 = completely disagree.

Question 4: Considering all the elements for strategising for sustainability, how would you rank them? 10 = most important. 1 = least important

Time was allocated as each element was presented individually and consecutively for subjects to evaluate in a focused manner.

Data analysis

Data was collected on multiple coloured and adhesive cards (Post-Its). These had drawn on shapes for responses and for ease of application of instructions given. It was in this form that the primary data was initially analysed. The process of reducing data to a manageable size involved capturing the data into interpretable excel spread sheets. This was done by using colour and coding the data to make the different data sets and criteria easily recognisable. Part of the

Strategising For Sustainability: Measurement And Validation Through An Applied Case Study
analysis process included the application of descriptive statistics including Average, Deviation,
Mode and Rank. Findings were reported as graphs and Tables to synthesise data into information.

Data criteria

Researcher A facilitated the session where practitioners were asked to rate, support, agree and rank elements from the evaluation tool used in the first research. Data was judged on a 5 point scale where 5 represented the most supported and 1 the least supported.

Strategies employed to ensure quality of data

Data was collected at one point in time from the primary practitioners onto Post-Its. These were gathered after the session into a sealed envelope. There was a record of biographic data of every participant in reference to all response cards. The data was captured directly from the primary source by the researcher. All data captured was by one researcher and without distraction. The practitioners were coded so as to avoid any potential biases based on practitioner's position and hierarchy in the organisation.

FINDINGS

Research Findings

From the literature, ten elements of strategy formulation and implementation were identified which formed the basis of the SSI tool as shown in Table 1. These were applied to the strategic communication of companies on the JSE to judge the level of sustainability embeddedness which resulted in a score. The SSI tool was then further developed and applied to company practice in the case study. The individual elements and their ratings are described for easy interpretation. Each measurement outcome is individually discussed.

Figure 1: Radar diagram depicting elements, support, embeddedness and agreement ratings from practitioners and embeddedness ratings for Growthpoint Properties using the SSI Tool.

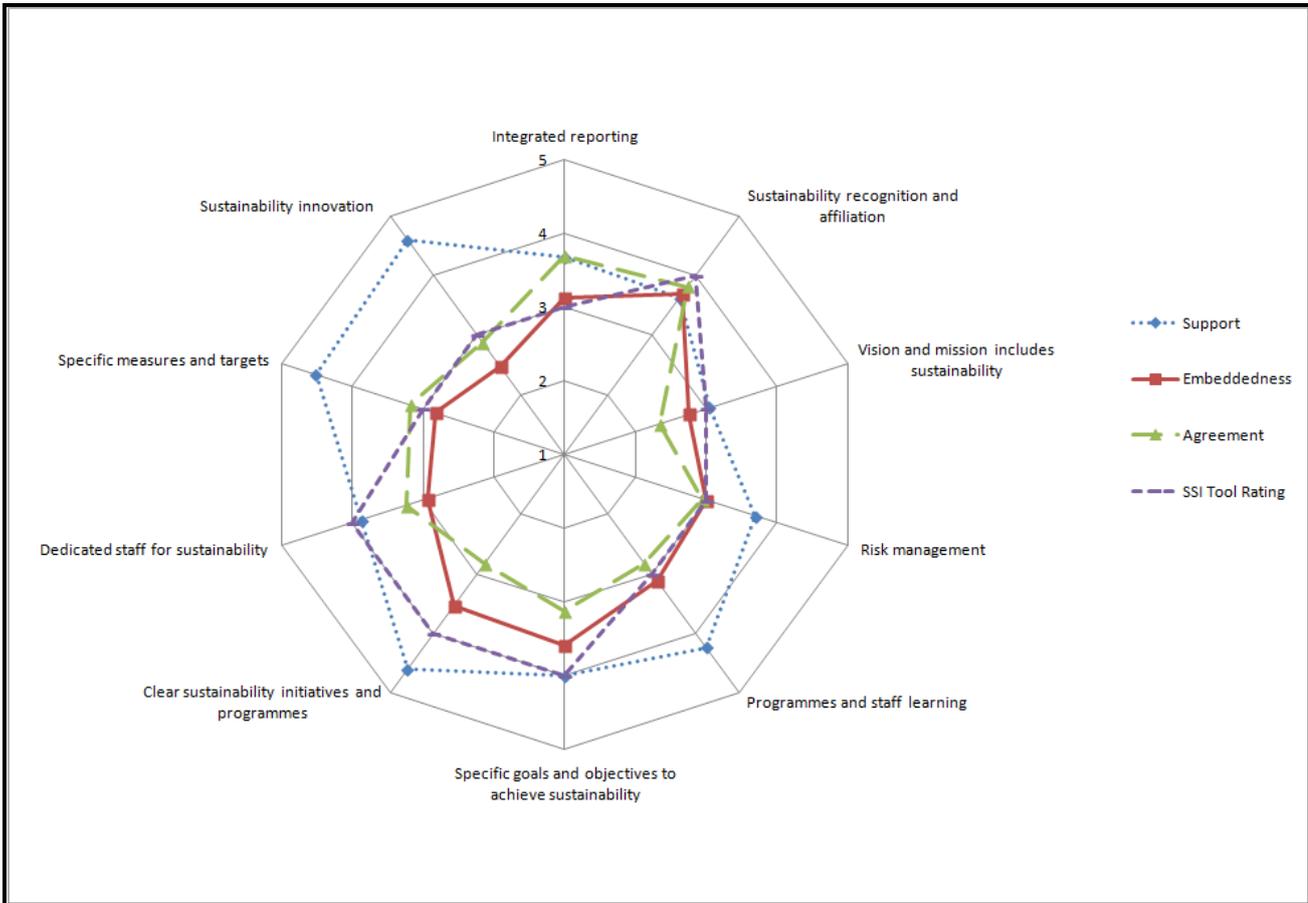


Figure 1 demonstrates the average ratings by practitioners on elements of SSI tool describing their level of support for the elements as indicators and measures for sustainability strategising in a company. The graph also portrays the average embeddedness ratings by practitioners on each element of the SSI tool pertaining to Growthpoint's sustainability strategising. The figure further indicates the average level of agreement by practitioners towards the researcher's scoring of each element on the SSI tool. Figure 1 also portrays the SSI tool rating for embeddedness by the researcher on publically available communication and documents of Growthpoint.

Support: all elements were supported as indicators and valid measures for determining strategising for sustainability although practitioners differed on the extent of their support. Interpretation of the information in figure 1 suggests that all measures for determining strategising for sustainability were considered primarily to be 'somewhat' (4) to 'highly' supported (5) by practitioners. However, practitioners were less sure (3) about the occurrence of sustainability in company vision and mission as being an indicator that the company is strategising for sustainability. The highest supported elements were the presence of 'specific measures and targets' for sustainability, evidence of clear sustainability initiatives and sustainability innovation.

Embeddedness: practitioners rated the level of embeddedness of each element of the SSI tool in Growthpoint strategising. The practitioners used their experiences and understanding as a frame of reference when answering this question. The mean rating of 3.4 for the compliance elements (integrated reporting and sustainability recognition and affiliation) suggested a relatively high level of embeddedness of sustainability compliance in the case company strategising. Practitioners rated sustainability embeddedness in strategy formulation elements as 3.12. They rated sustainability embeddedness in strategy implementation elements a mean rating of 2.94. The findings for embeddedness rating by practitioners indicate that sustainability is embedded evenly across the elements of strategising for sustainability. The strategy implementation mean rating according to practitioners was slightly less than formulation which suggests more strategic planning than executing. This contrasts the finding by the researcher on the SSI tool as applied to publically available communication of Growthpoint. The researcher reported more strategy implementation than formulation present on the corporate website and other sources. This confirms a degree of disjointedness between what is said and what is done however, also determines that the SSI tool is very accurate in measuring the level of embeddedness as the deviation is very minimal.

In reference to figure 1, when a comparison is made between the ratings by practitioners and those findings from the researcher, both using a 5 point scale and the elements of the ssi tool, the largest deviation is found in the element of dedicated staff for sustainability. Practitioners indicated there is less embeddedness of dedicated staff in company strategising than reported by the researcher. The external messages/claims communicated greater embeddedness of dedicated staff in strategising for sustainability in the case company. A rating of four was given to the existence of dedicated staff for sustainability by the researcher on the SSI tool. This differed to the mean rating by practitioners which was three. This may indicate that practitioners do not believe that dedicated staff for sustainability are as embedded in strategising to same degree as the researcher judged it to be when using the external communication of the company. This rating was given in spite of the case company's' sustainability division's (ie: dedicated staff) presence in the session. This may suggest another measure of disjointedness both between what is said and what is done but also amongst Growthpoint divisions, in order to gain more insight into the embeddedness of sustainability and specifically, that of the dedicated staff as well as the differences in opinion, the following comparison was made.

The average score per element as rated by practitioners from all departments except for that of sustainability, was compared to, the average score per element as rated by practitioners in the sustainability department. The three elements with the largest average differences are shown in Table 3.

Table 3: Comparison of the average embeddedness ratings between the practitioners from the sustainability department and other staff divisions in the case company, on the three elements with the largest average differences.

	Vision & Mission includes	Risk Management	Programmes & Staff Learning
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Sustainability			
Average score of embeddedness per element for <u>all divisions</u> in the sample except Sustainability (n = 14)	3.071	2.642	2.786
Average score of embeddedness per element of the <u>sustainability division</u> (n = 3)	1.333	4.667	4.667
Differences between average score per element of the practitioners from all divisions except sustainability to those in the Sustainability department	1.73	-2.023	-1.881

Table 3 indicates there are differences in ratings between the sustainability department (dedicated staff for sustainability) and the rest of the practitioners. The level of embeddedness for risk management was rated as far more embedded by the sustainability department than by the other divisions (4.667). The sustainability department also of the opinion that sustainability programmes and staff learning were strongly embedded in strategising (4.667), more so than the rest of the subjects. This differed from the other divisions who did not rate the embeddedness of this element very highly (2.786). This may suggest that programmes could not be as widely integrated with other divisions and general strategising. Interestingly, the other subjects rated the embeddedness of sustainability in Growthpoint’s vision and mission as higher than the sustainability department.

Agreement: finally, at the end of the facilitation process, practitioners were shown the results of the application of the SSI tool to their company’s external communication by the researcher. The SSI tool’s score for the case company was based on application of the SSI tool to all publically available communication including reports by the researcher. The scores indicated the level of agreement by practitioners towards the researcher’s score with 5 being total agreement. Table 4 shows the practitioners average agreement rating towards the researcher’s score on the SSI tool for each element, the element rankings by agreement and importance rankings.

Table 4: The practitioners average agreement rating towards the researcher score on the SSI tool for each element, element rankings by agreement and importance rankings.

Element:	Agreement to SSI Tool evaluation			Mode for agreement	Rank by Importance of elements	
	Researcher Score on SSI Tool	Practitioners average agreement rating on the SSI tool's score for each element	Rank based on agreement (10 = high)	Mode determined from agreement score	Practitioner Average score for rank of elements by importance	Rank of averages based on importance (10 = high)
Sustainability recognition & affiliation	3	3.812	10	4	3.375	2
Integrated reporting	4	3.688	9	4	3.25	1
Dedicated staff	3	3.235	8	4	6.470	7
Specific measures & targets	3	3.176	7	4	8.588	10
Specific Goals and Objectives to achieve sustainability	3	3.118	6	4	6.882	8
Risk management	4	2.941	5	2	4.353	3
Sustainability innovation	4	2.882	4	2	5.23529	6
Programmes & staff learning	3	2.823	2.5	2	4.824	4
Clear Sustainability Initiatives and Programmes	4	2.823	2.5	2	7.176	9
Vision & Mission includes Sustainability	3	2.353	1	2	4.941	5

Table 4 shows the findings from the agreement and importance questions. In the table, the rank based on agreement shows the element that practitioners agreed most with the researchers score. The mode shows the rating of agreement out of 5 towards the researcher's score - that occurred the most. The table also includes the average rankings by practitioners by importance between 1 and 10. Their average responses were ranked to show which elements are considered most and least important as elements for determining sustainability embeddedness in strategising.

The highest ranking deviations between the researchers score and the agreement of practitioners to the score are explained as follows;

The rank based on agreement demonstrates that practitioners were in most agreement (10) with the SSI tool's score for the element: sustainability recognition and affiliation. This element pertains to the recognition and affiliation of a company with/towards associations sharing the same sustainability values. The average agreement response for this element was 3.812 indicating strong agreement.

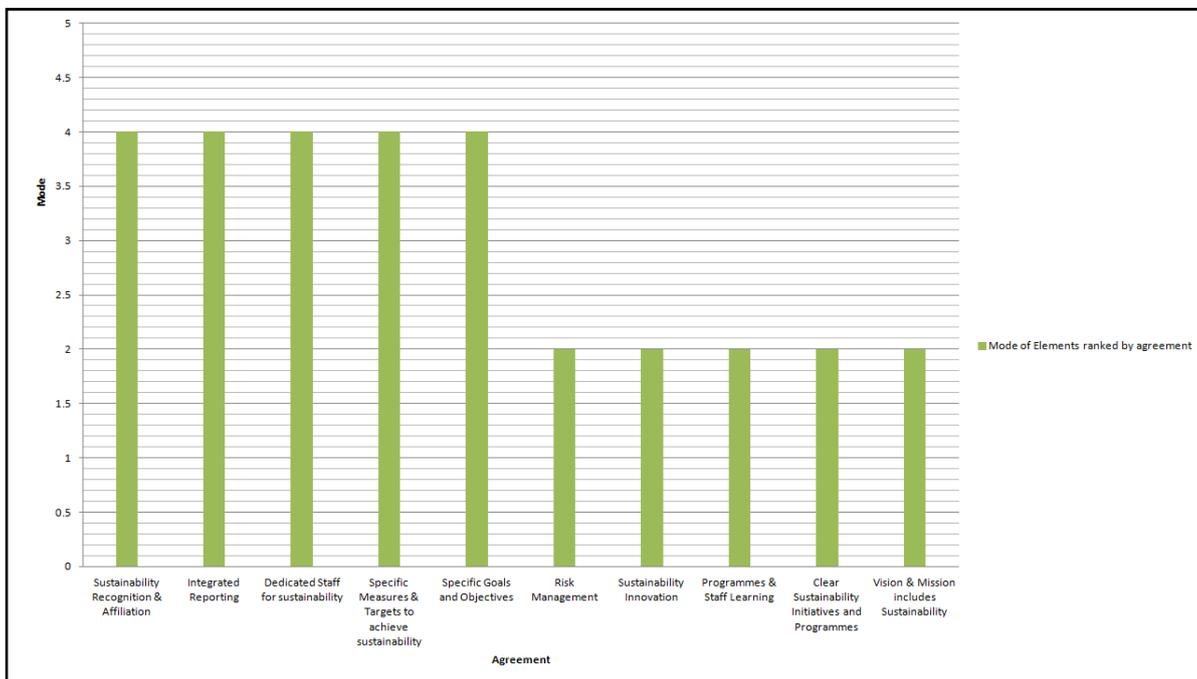
Practitioners highly agreed with the researcher's score for the element; integrated reporting. The average agreement response was 3.688. The rank based on agreement demonstrates that practitioners were in high agreement (9) with the researcher's score for this element.

These elements show that there is much support for these ratings by the researcher using the SSI tool. On the bottom end, practitioners showed an average agreement score of 2.353 for the element: vision and mission includes sustainability. The rank based on agreement reveals that practitioners disagreed (1) the most with the researcher' score for this element (mode = 2). The researcher awarded a score of 3 according to the criteria on the SSI tool.

Mode: the value that occurs most frequently for each element (the mode) was evaluated for this data set on the agreement responses. The mode was determined for each element on the SSI tool on agreement ratings (also see table 4). The mode of four occurred most frequently indicates strong agreement by the practitioners. A mode equal to four was obtained for two compliance elements, two strategy implementation elements and one strategy formulation element. The remaining elements on the SSI tool have a mode of two suggesting less agreement. Practitioners

agreed mostly with the researcher on the researcher’s score for the compliance elements. Figure 2 indicates the modes for the data set on agreement. The modes were ranked by the importance of the element.

Figure 2: Bar graph indicating the modus frequency of elements by agreement



Rank: practitioners ranked the ten elements by importance for sustainability. The rank revealed that practitioners found the element: specific measures and targets for sustainability, as most important by ranking it first (rank score = 10). Practitioners ranked the integrated report as least important suggesting that it demonstrates the least embeddedness of sustainability in strategising. An integrated report is the product of a process or system of processes that seeks to inform stakeholders of an organisations ability to heed to stakeholder and or societal concerns and to provide meaningful performance information to support assertions suggesting effective sustainability management. It is to demonstrate how well an organisation has embedded a comprehensive view of sustainability into the strategic fabric of the organisation that leads the reader to understand whether the organisation is well placed to adapt to economic, social and environmental factors (sustainability services, 2011). In spite of the purpose of the integrated

report being to communicate the company embedded view of sustainability, subjects proposed that integrated reporting is not an important factor for determining sustainability embeddedness. Practitioners rated it the lowest on the SSI tool. This suggests that practitioners do not think that the compliance element is a strong indicator for sustainability embeddedness. An integrated report was as such, not considered as important as measures and targets for sustainability nor more important than initiatives or programmes for sustainability, both of which are strategising activities. Also see table 4 and figure 1.

The insight gained from these questions offers support for the relevance and applicability of this SSI tool. The ability to rank the elements by the practitioners discloses the elements suitability as indicators in measuring a firm's strategising for sustainability embeddedness.

Finally table 5 shows the difference between the two methods for embeddedness measures. The practitioners rated the embeddedness lower than the researcher. For compliance and formulation the differences were small but for implementation, it was much lower (no significance determined). This finding is interesting as the two evaluations were based on different sources of information. The researcher used the public documents as source data while the practitioners used their own experience and perceptions to base their judgment on. What can be deduced from table 5 is that implementation is not rated as high compared to what is claimed.

Table 5 Comparison of SSI category based on different strategising components compiled on SSI ratings of researcher and practitioners for the case company

STRATEGISING CATEGORY	Compliance	Formulation	Implementation
Researcher rating SSI Mean / category for embeddedness out of 5	3.5	3.25	3.5
Practitioner rating SSI Mean / category for	3.4	3.12	2.94

embeddedness out of 5			
Difference	0.1	0.13	-0.56

PROPOSITIONS AND DISCUSSION

This section links the propositions and the findings before the discussion takes place in the next section

P1: Elements of SSI can be rated by practitioners

Sufficient support was found as practitioners in the research were able to rate the elements of the SSI tool on the provided 5-point scale. They could use the indicators to discriminate sustainability strategising in a company for embeddedness, agreement and importance. Practitioners identified those elements as most and least important using rank. The results of practitioners ability to rate indicates the elements were understood and of substance to be able to be rated. The SSI tool is supported by practitioners as a measure of strategising for sustainability. Based on the support for proposition 1, it was meaningful to progress to the next propositions.

P2: Practitioners support the SSI as a means of measurement of sustainability embeddedness

Sufficient support was found as practitioners, by means of rating and judging the elements of the SSI tool as measures for determining sustainability embeddedness in strategising, supported the SSI tool as valid for sustainability measurement. Further support for the SSI tool as means of measurement was derived from the practitioner's ability to determine the level of embeddedness for sustainability in strategising within their own working environment. They used the elements of the SSI tool to determine the case company's sustainability embeddedness. Practitioners were asked; How embedded is each element on the SSI tool in Growthpoint's strategising? Their ability to respond supports the SSI tool's ability to measure sustainability embeddedness in an organisation.

P3: Elements are incorporated into strategising

Sufficient support was found as practitioners, using the elements that they supported, were able to judge the extent to which elements of sustainability were embedded in strategising. The level of embeddedness of sustainability was rated in the company using the elements. Practitioners described the extent to which sustainability was embedded in strategising which suggests that the elements should form part of strategising for sustainability if rated.

P4: Practitioners obtain direction from the results

Sufficient support was found as much direction can be obtained from the results. Practitioners can boast the following benefits from the SSI tool and its findings:

Resource and time allocation: the results highlight the embeddedness ratings of Growthpoint according to practitioners in the company. These have also been compared to the publically available communication. Knowledge of company embeddedness allows for improvement and heightened awareness of shortfalls for resources to be allocated accurately towards. The results also show those elements that practitioners find most important in determining sustainability embeddedness allowing more attention to be paid towards those indicators.

Knowledge: results show management the opinions, views and experience of staff towards strategising for sustainability. Few companies are informed of their staff perceptions. This knowledge can transcend into informed organisational restructuring and management knowhow.

Legitimacy: the findings also compared the embeddedness rating of the SSI tool on public communication to the ratings by practitioners. The results indicated the alignment of claims with actions. This SSI tool will aid them to monitor this result to uphold legitimacy. The differences observed in Table 5 can be used as feedback for evaluation and investigation. While the researcher evaluation is the cheapest option, it should probably be supported by practitioner evaluations to gain the management benefits from involvement, reflection and measurement.

CASE STUDY AS A VALID RESEARCH METHODOLOGY

Given the insight gained from these findings and the support found in answering the propositions, the researchers believe that the use of a single case study approach has been confirmed as suitable methodology for this research.

The case company practice approach presented a significant opportunity to learn and the researchers assert that the findings of this research have produced insight for both the case company and to the academic body of knowledge and theory on the embeddedness of sustainability in strategising.

The case study research approach enabled the use of multiple methods for data collection and analysis. Patton, (1990) suggests that to improve the quality of research findings, research methodology should include multiple sources of evidence and different data collection techniques. The researchers believe that there was a sufficient variety of methods for data collection and analysis in the research for a case study approach. Annexure A provides a summary of the specific types of information, the data sources, data collection technique, data recording method and type of data collected through this research of a case company.

Many well-known case study researchers such as Stake, (1994), Simons, (2009) & Yin, (1989; 2003) have written about case study research and suggested techniques for organising and conducting the research successfully. The researchers have taken their suggested techniques into consideration. Annexure B describes the technique and subsequent measures to ensure that the case study was organised and conducted to be exemplary in nature and to yield successful research outputs.

MANAGEMENT IMPLICATIONS

The purpose of this research was to determine if the SSI tool can be applied in practice through measurement and validation of the elements of the SSI tool. The decision to apply the SSI tool to practice was derived from a desire to address an implementation gap in strategising for sustainability.

The research explored the practical value of the SSI tool by searching for the embeddedness of sustainability in internal structures of strategising. The following questions were asked; 'Can the Strategising for Sustainability Index (SSI) tool be supported in practice?' This leads to questions of whether 1) elements can be rated by practitioners and if they fact 2) support the SSI as a means of measurement of sustainability embeddedness followed closely by inquiring into 3) the extent to which elements are incorporated into strategising and 4) if practitioners can obtain direction from results.

The outcome of the research was that the SSI tool could be supported in practice and all propositions have been supported. It has also been determined that the SSI tool is an accurate measure for embeddedness showing minimal difference in embeddedness ratings between its application to external documents and internal practices

The ratings by practitioners for embeddedness on the SSI tool's elements were closely aligned with those scores given by the researcher. This means the SSI tool can be applied to a company's external communication and give an accurate reading for embeddedness internally. It also further supports the SSI tool's ability to be used in practice. The strategic focus of this SSI tool overcomes empty talk and false sustainability claims by focusing on strategising and thereby identifying sustainability.

After concerns about the legitimacy of sustainability claims, this research revealed that claims are aligned with practice for compliance and formulation while implementation should be further investigated. The external communication of Growthpoint, thus; suggests greater implementation of sustainability practices than present internally. There was a deviation of -0.56.

Deviation was greatest within the sample where the sustainability team of Growthpoint rated sustainability embeddedness quite differently to the rest of the sample. Practitioners' average response to the embeddedness of dedicated staff in strategising was a rating of 3. This indicates that practitioners were not as convinced as the researcher of the embeddedness of dedicated staff in company strategising. This rating was in spite of the existence of a sustainability department and their presence in the research. The explanation of this is that practitioners – even though they knew of the existence of and achievements of the sustainability team - believe that these practitioners are not embedded in the organisation's strategising for sustainability. On this continuum of thought one can deduce that there is a degree of disjointedness between corporate strategising for sustainability and the practice of a sustainability division.

Kane, (2011) confirms the disjointedness and addresses this issue by proposing that the radical transformation that is required of businesses (in terms of sustainability) cannot possibly be driven by environmental managers hidden away in their environmental silos and staff functions. It appears that this might be the case with Growthpoint strategising and the sustainability department.

These findings echo the cries of sustainability management who find embedding sustainability into strategising as a 'complex' and 'elusive' goal (Elmualim *et al.*, 2010:58). There is disjointedness and not all staff views and understanding are the same. The struggles of sustainability

management can be sympathised with when considering that practitioners did not rate the dedicated staff highly present in company strategising for sustainability. This emphasises the sustainability division 'silo' Kane refers to.

The findings from the research also support literature on sustainability and strategising and has further explored the concept of embeddedness of sustainability. It was found that embeddedness could be measured, supporting the existence of sustainability embeddedness in strategising. The practitioners' ability to rate the extent of sustainability embeddedness in their company revealed that; the process of embedding sustainability may be complex but the goal is not totally elusive.

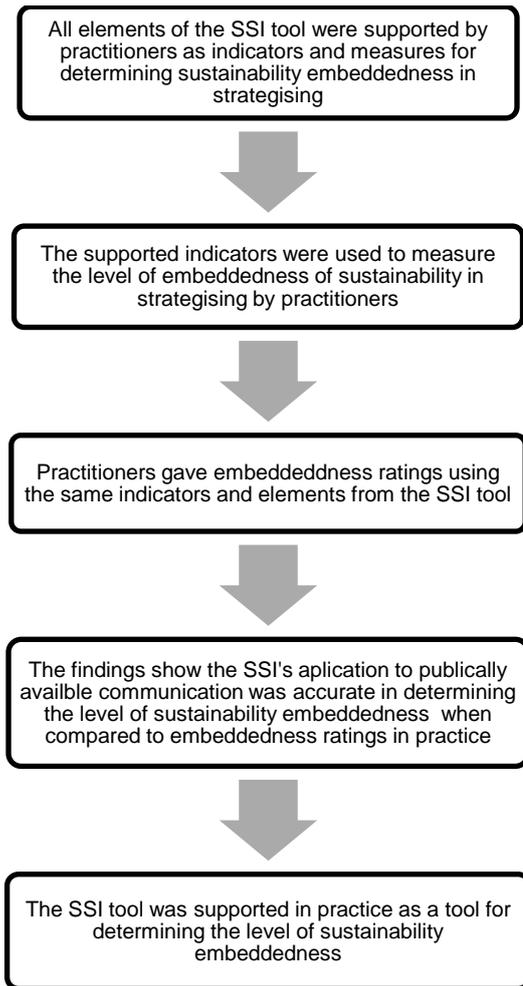
In reference to the agreement question, practitioners agreed strongly with the researcher's score for embeddedness (mode of 4) for five elements on the SSI tool. The highest agreement rating for the researcher's score was for the element: Sustainability recognition & affiliation. The agreement ratings however, were not aligned with the embeddedness ratings given by the same practitioners. The findings from practitioner's agreement ratings reveal that practitioners were harsher in their agreement ratings when judging the SSI tool's application to the company. Practitioners were harsher in their ratings than when asked to give their own opinion of embeddedness. There was an inconsistency between the ratings of embeddedness using the SSI tool and the agreement to researcher's rating of embeddedness. This was in spite of using the same elements on the SSI tool.

It is suggested that these findings derive from a form of self evaluation bias. Practitioners could have experienced discomfort at being judged and this affected their agreement ratings but decided to be more honest when asked their opinion of the level of embeddedness of sustainability in strategising activities.

Rank findings showed that when practitioners were asked to discriminate the elements by importance, they became selective and ranked those they felt most important for determining the embeddedness of sustainability in strategising. The integrated report was ranked least important as an indicator for determining sustainability embeddedness. It is also rated one of the least supported elements by respondents who rated it second to last in the support question. This indicates that an integrated report, in spite of its definition, is not considered very important as a measure of sustainability embeddedness. An integrated report could therefore exist despite of an absence of sustainability embeddedness. This knowledge may speed up resource allocation decisions into improving the level of embeddedness in those elements considered most important to practitioners.

Through this research, the SSI tool has received validation and support by obtaining practitioner support for the elements as valid measures, their ability to rate the embeddedness using the elements, their agreement with the application of the tool and their ranking the importance of the elements. The results of this research reveal that the SSI tool can, in fact, be applied and has value in practice. Practitioners were able to use the same elements to rate embeddedness of sustainability in strategising of their own company. The SSI tool has discriminating value through its application. Figure 3 shows the support and validation for the SSI tool through this research.

Figure 3 Reasoning of this research



LIMITATIONS OF THE RESEARCH AND FUTURE RESEARCH SUGGESTED

Simons, (2009) reports that critics of the case study method believe that the study of a small number of cases can offer no grounds for establishing reliability or generality of findings. That it is too subjective to contribute to grounded theory or policy making on the topic. Others propose that the intense exposure to the study of the case, in fact biases the findings. Some dismiss case study research as useful only as an exploratory tool. Yet researchers continue to use the case study research method with success in carefully planned and crafted studies of real-life situations, issues, and problems (Yin, 2003).

Limitations

During the facilitation session there were these limitations and biases:

Noise and Distraction: The sample of practitioners involved colleagues resulting in conversations sometimes started amongst colleagues. Also, on occasion practitioners left the room to take a phone call. Other noise disturbances occurred when people arrived late or left early. The facilitator tried to minimise break out discussion or attention to the distraction through mechanisms of engagement.

One senior management practitioner got aggressive and did not support the methodology of the evaluation and facilitation process used by the facilitator. This caused him to make verbal outbursts and leave half way through the session. Other participants were surprised at this colleague's behaviour. This served as a distraction before continuing with the process. The results obtained were considered for skewness of results however, it was found to have no drastic impact on the research.

Time Constraints: In light of needing to get through the necessary questions during the period allocated, questions were asked directly with a short explanation. Little time was provided for discussion or in depth thinking and practitioners needed to respond quickly.

Case study as a limitation:

Case study research, while an appropriate research approach for studying sustainability embeddedness of companies on the JSE ALSI Top 40, it is not without its limitations and problems. A major limitation of a single case study is the lack of statistical generalize- ability

(Simons, 2009). This study did not have a goal of generalise ability but one of understanding a complex phenomenon. This study was an exercise in developing a descriptive model that would be supported in practice on its ability to describe the status of an investment portfolio case company's strategising for sustainability. The researchers believe however, that insofar as Growthpoint may be a revelatory case of strategising for sustainability, it was possible to abstract or distil important conclusions and learning from the study including:

- The SSI's tool can be supported in practice and is an accurate measure for embeddedness showing minimal difference in embeddedness ratings between its application to external documents and internal practices.
- The strategic focus of this SSI tool overcomes empty talk and false sustainability claims by focusing on strategising and thereby identifying sustainability and thereby addresses the criticism of company external communication on sustainability claims
- There is a disjointedness between corporate strategising for sustainability by the company and the practices of dedicated staff in the sustainability division.
- It was found that embeddedness could be measured, supporting the existence of sustainability embeddedness in strategising. The practitioners' ability to rate the extent of sustainability embeddedness in their company revealed that; the process of embedding sustainability may be complex but the goal is not totally elusive.
- Practitioners rated the elements of strategising by their importance for embedding sustainability. This was measured twice in different ways. The knowledge of those elements considered important to measuring embeddedness may speed up resource allocation decisions into improving the level of embeddedness in those elements considered most important to practitioners.

The researchers believe the findings of this study offer significant usefulness and insight for the case company, as well as for academics and practitioners who stand to learn from the strategising activities and the implications of embeddedness in strategising.

The findings and conclusions that may be tested in other contexts include:

1. Practitioner support for the SSI as a means of measurement of sustainability embeddedness.
2. The extent to which elements are incorporated into strategising
3. The relationship between the score given on external communication and the level of embeddedness by practitioners
4. The congruence between the agreement with the researcher's score for sustainability embeddedness and practitioner rating for embeddedness.

Suggested future research

Strategising for Sustainability and the embedding of sustainability as a strategic process has been partially explained by the SSI tool. The tool has been applied to external communication and then applied internally to a company however, this begs the question of: how do strategists go about strategising for sustainability? Various researchers have sought to explore the 'doing of strategy' (Jarzabkowski *et al.*, 2007:5; Jazarbkowski & Spee, 2009:69). Their research asks strategy questions such as 'how it is done?', 'who does it?' and 'what do they use to do it?' Findings support the field of practice research to address the theory gap between the theories of strategy and actual practice.

Future research should investigate those practices of strategists. Identify and explore those practices and praxis applied by practitioners in the process of strategising for sustainability. Future research should be directed to this with a case company. The leading research questions could be: what are those practices and praxis's for embedding sustainability into strategising? In other words; what are practitioners doing (or not) to embed sustainability into strategising?

Future research could also expand the scope of research to further explore the gap between what is said and what is done with other Top 40 JSE companies. The research could also address the gap between what they claim and what they are doing on other case companies. The study could attribute to the body of literature on the topic and yield much practical value for another case company.

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Annexure A: Data collected for case study

Table describing the types of information, data sources, data collection techniques, data recording methods and type of data collected through this study of a case company.

Type of information	Data source	Date collection technique	Data recording	Type of Data
Approval and consent	CEO and practitioners	Verbal request and written response	Written document	Qualitative
Biographic information	Practitioners in sample	Handing out of questionnaires	Questionnaire	Qualitative and Quantitative
Support for the SSI elements as measures/indicators to determine sustainability strategising in a company on a 5 point scale.	Sample practitioners on top, middle and lower management across functional and line divisions and including the sustainability coordinator	Facilitated focus group session with instructor and prepared questions	Post it stickers with responses on 5 point scale. a modified process described by Bjornson, Wang and Arisholm (2008)	Quantitative
The extent of embeddedness of each element on the SSI tool in Growthpoint's strategising on a 5 point scale	Sample practitioners on top, middle and lower management across functional and line divisions and including the sustainability coordinator	Facilitated focus group session with instructor and prepared questions	Post it stickers with responses on 5 point scale. a modified process described by Bjornson, Wang and Arisholm (2008)	Quantitative
The extent of agreement with the researcher's rating score of Growthpoint for each element. On a 5 point scale	Sample practitioners on top, middle and lower management across functional and line divisions and including the sustainability coordinator	Facilitated focus group session with instructor and prepared questions	Post it stickers with responses on 5 point scale. a modified process described by Bjornson, Wang and Arisholm (2008)	Quantitative
The rank of all 10 SSI tool elements by importance	Sample practitioners on top, middle and lower management across functional and line divisions and including the sustainability coordinator	Facilitated focus group session with instructor and prepared questions	Post it stickers with responses on 5 point scale. a modified process described by Bjornson, Wang and Arisholm (2008)	Quantitative

Annexure B: Techniques for exemplary case study research

TECHNIQUE FOR EXEMPLARY CASE STUDY RESEARCH:	MEASURES TAKEN BY RESEARCHERS:
Form questions about the situation or problem to be studied and determine a purpose for the study	The researchers utilised Table 2 titled: Research Design Components. This table was adapted from Yin's, (2003:21) design and guided the researchers about the problem being studied.
Create a guide for how the study will be designed, conducted, and publicly reported.	A programme for the session was planned as part of the Workshop plan which guided the process and the facilitator.
Carefully examine the choices available from among many research tools available in order to increase the validity of the study.	This research incorporated Post it stickers to document responses which was a research tool adapted from a process described by Bjornson, Wang and Arisholm (2008). This tool was used to record the data from the questions pertaining to the primary research tool: the SSI tool for measuring the embeddedness of sustainability in strategising.
Research cases which are unique in some way could include more than one unit of embedded analysis.	The following unit of investigation was applied in the research: Elements that make up sustainability embeddedness within the strategising of a company as measured by the SSI tool. The following unit of analysis was embedded: Managers and staff involved with strategising for sustainability.
Use multiple sources and techniques in the data gathering process	Refer to Annexure A.
Prepare designated data gathering tools in a systematic way and apply properly in collecting the evidence	Data was recorded on Post It stickers, sealed in an envelope and then systematically captured and coded on Excel. The evidence remained preserved throughout the research.
Exemplary case study design ensures that the procedures used are well documented and can be repeated with the same results over and over again.	The research methodology and design procedure has been described in full in this document and the researchers believe repetition of the research using the same procedure and sample will yield congruent results.
Exemplary case studies use field notes and databases to categorize and reference data so that it is readily available for subsequent reinterpretation. Field notes record feelings and intuitive hunches, pose questions, and document the work in progress. They record testimonies, stories, and illustrations which can be used in later reports. They may warn of impending bias.	The researcher made notes during the facilitated session. The field notes recorded the responses of participants to the questions, their ability to answer and any changes to the process. The field notes recording noise disturbances and the behaviour of one practitioner which could have skewed the results but it was found to make no significant impact on the research. The field notes also recorded obvious limitations of the research as well as highlighted the areas for future research.
The investigator training program should cover the basic concepts of the study, terminology, processes, and methods, and teach investigators how to properly apply the techniques being used in the study.	The facilitator was well prepared on the topic, the research questions and the procedure for capturing the data. The facilitator prepared a PowerPoint Presentation to guide the session and had readily available terminology to clarify any discrepancies.
Throughout the evaluation and analysis process, the researcher should remain open to new opportunities and insights.	The researchers remained open to all possibilities as to what the outcome of the application of the SSI tool to practice may be and were able to draw insight from the findings to describe the management implications of the research's results.

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Strategising For Sustainability: Measurement And Validation Through An Applied Case Study

Source: Own compilation from principles of case study research methodology: Stake (1994),
Simons (2009) & Yin (1989; 2003)