**Values work with B Corp: Sustaining membership with a prosocial certification**

**Online Supplement**

**Appendix A: Interview protocol for initial round of interviews (2018)**

1) Tension-focused questions:

* First, in your own words, what is the mission of your company?
* Would you say this is one coherent mission, that includes multiple goals? Or do you think the company has multiple missions, each with a different set of goals?
* Do any of these goals [or missions] take precedence over the other(s)?
* Can you provide an example of a decision in which when there was tension between your for profit goals and your pro-social or pro-environment goals?

2) Values and identity-based questions:

* If you could describe your organization as a person, what are 2-3 keywords that would describe “who this organization is”?
  + - What makes your organization different from other organizations, in the same industry?
    - In your opinion, which of these keywords fit together easily, mesh without tension? Why?
    - How do you want others [externally] to view your organization?
    - Can you provide an example of a time when these keywords [or values] conflicted in the workplace?

3) B Corp engagement questions:

* What was the original motivation for your organization to certify with B Corp?
* Is having the B Corp certification a big revenue driver for your firm? Why or why not?
* What is an example of the primary benefit that being B Corp certified brings to your firm, internally?
* Did you make any major changes when adopting the B Corp certification?
  + Have you changed individual practices here and there? Why?
  + Were these practice changes on the periphery or in your core activities?
  + How have these practice changes affected your mission – same mission, tweaked practices? Or tweaked mission?
* Can you provide an example of a decision in which when there was tension between your for-profit goals and your pro-social or pro-environment goals, and the B Corp certification influenced that decision?
* What is an example of how adopting the B Corp certification helps your company manage any tensions in its mission(s)?
* What is an example of how adopting the B Corp certification inhibits your company in managing the tensions in the company’s values?
* What would make you drop the certification?
  + Is the certification necessary for signaling authenticity?
  + What about if [a company with a bad reputation] joined the B Corp certification?

**Appendix B: Interview protocol for follow up interviews, companies still certified (2024)**

1) Certification follow up:

* What are 1-2 examples of anything that has changed in the way your company engages with the B Corp program, in the last six years?
* Prompt: Have your motivations to stay certified changed, compared to your initial motivations to certify?
* Prompt: Do you use it more or less to shape your decision making?
* Prompt: Do you seek to influence it more than you did in the past?

2) Certification community engagement:

* Do you engage with the B Corp community in any way?
* If so, what are 1-2 examples of that? What value do you and your company obtain from that engagement?
* If not, why not? Do you see any value in engagement, or not?

3) Feedback on initial findings:

* At this point, I’ll review our initial findings and will ask for your feedback.
* Do the patterns from our findings ring true to you? If so, why; if so, why not?
* Additionally, we found that those companies enacting one of the patterns, versus the other two, were more likely to drop the certification later. Do you have any thoughts as to why?
* We mapped your company as being in this pattern: \_\_\_\_\_ in 2018. Do you agree with that? Would you still place your company in that pattern, or a different one?

**Appendix C: Interview protocol for follow up interviews, companies no longer certified (2024)**

1) Certification follow up:

* We note that your company is no longer certified. Why did your company make the choice to discontinue with the B Corp certification, since we first spoke?
  + Prompt: Did your motivations to stay certified change, compared to your initial motivations to certify?

2) Certification community engagement:

* While you were certified, did you engage with the B Corp community in any way?
  + If so, what are 1-2 examples of that? What value did you and your company obtain from that engagement?
  + If not, why not? Did you see any value in engagement, or not?

3) Feedback on initial findings:

* At this point, I’ll review our initial findings and will ask for your feedback.
  + Do the patterns from our findings ring true to you? If so, why; if so, why not?
  + Additionally, we found that those companies enacting one of the patterns, versus the other two, were more likely to drop the certification later. Do you have any thoughts as to why?
  + We mapped your company as being in this pattern: \_\_\_\_\_ in 2018. Do you agree with that?

**Appendix D: Final coding structure of values work and practices, with exemplar data**

| **Values Work (Aggregate dimensions)** | **Values Practices (Second-order themes)** | **Descriptions** | **Exemplar Data** |
| --- | --- | --- | --- |
| ***Internalizing* values work** | Idealizing | Devising new desired organizational values, using prosocial certification as a benchmark | I think [B Corp] helped round [our mission] off. I think we were a little scatterbrained going into [certification]. We wanted to be first green shop, we wanted to be able to say that, we wanted to use [B Corp] for marketing. Then we started finding out this stuff. I really wanted to take care of my employees. There was so many things, it was chaos in the process of evolving our business into our new space. B Corps helped us narrow [our vision]. [36, 2018]  I think that the real benefit [of B Corp membership] to the company has continued over the years [is] that our mission really does revolve around making the community a better place. So, whether our B Corps certification that did that, no. But, our B Corps certification did play into an overall narrative that is important… You know, that storyline of that purpose for us. [27, 2018]  And a lot of it was seeing some of the companies who we kind of, admired or, you know, who we want to be when we grow up as and seeing that they were B Corps … like Patagonia. [37, 2018]  We really are trying to do everything we possibly can to outwardly impact [environmental issues] and show that there can be a better way ... And along that road it's hard sometimes to stop and look in and say, "okay are we actually matching those values internally?" ... Until you have something that really forces you to look in, it's easy to not see or even ignore or just maybe there's a subconscious knowledge that you could improve in a certain area ... And I think that's just critical for people because otherwise you're just … sprinting through your life, [but with] those benchmarks … you can get [there] a lot faster and more effectively. [12, 2018]  [B Corp] definitely helps us be more thoughtful in the world that we're in. I mean, without a doubt. That's a real high value to me in what B Corp provides. ... B Corp doesn't let your business stagnate. … And everything's changing so rapidly, and there's so much that we are frankly doing wrong in business. ... So, I think that having that kind of guide, of, like, here's opportunities to become a better business in the world that's evolving around you, that's a really great framework. [15, 2018] |
| Incorporating | Adding values from prosocial certification | The impetus [for certifying] was, I wanted to see what it would take for [my company] to be more sustainable and to be better, just better. … In the process [of certifying], I learned about a whole bunch of things that I could do better and that was really exciting. ... [And] we keep trying to improve, every time I go through the certification process I learn something new. [39, 2018]  By having the pressure of the B Corps certification ... you're forced to create ... a for-profit company that can get you over [the finish] line. So, that's really just what this [is] for me, ... a focus on, "What are the types of things we have to do to keep our focus out past that finish line?" ... [I]t's just enough of a set of guidelines to focus our attention on what's important and keep us talking about the fact that we have to do a certain amount of things to stay within this realm. [35, 2018]  [B Corp] provided a good structure for us to improve. So, the first certification we learned where we were already aligned, and how we could do better. In this most recent certification, we could see the progress that we made in between those two periods, and then be able to again, work towards another kevlar set of improvements that would have taken us longer, more likely, to get there, had we not had that structure that the B Corp Impact Assessment provided. [11, 2018]  [B Corp certification] allowed [us] to create a number of documents and prove that we were doing what we said we were doing, which I think was ultimately really helpful to everybody. [We] created an employee handbook, [we] made a number of decisions on benefits-types things that as a small company [we] hadn’t had to decide before then. … We’ve been doing even more bookkeeping on service hours, pro bono work and trying to measure our impact and measure what we are actually doing so we can get credit for it, which I think has been helpful. [17, 2018]  There were some [practices] that when we went through [B Corp certification], ... we said, "Huh, yeah, that's a good idea. Why don't we do that?" Or, "Yes, we're doing that, but are we telling our employees we're doing that?" There were some things that we changed, not so much to get the accreditation but because they were things that I thought either we should be doing or doing in a different way. So, we started to do them. [10, 2018]  [B Corp] did change our mission. When we certified, we made an active decision to work with companies that were companies that wanted to do good in some way, that wanted to have a positive influence in the world, that operate in a positive way. [21, 2018]  Internally, I would say [certification] has pushed us a lot. ... I have information now, where if somebody has a problem, that it goes outside of what we do [currently], I'm like, “Hey, … it's in B Corp, you could check that out.” [15, 2018]  We have a clear vision of who we are as a business in terms of our vision and our goals. But we're always constantly learning how to be better. With recertification, we did learn things that we wanted to add and improve in for our team, like benefits that … we currently didn't have. So we're currently in the process of making that better. [And] I do feel like the vision of B Corp … is just that that extra guidance or extra push … [before] we get recertified, and we have several years to just keep pushing it. [8, 2024] |
| Reframing | Redefining existing organizational values, relative to prosocial certification | [B Corp doesn't] constrain. It's a guideline. ... There was a change of thinking for us when we got [B Corp] to understand, "hey look, let’s look for these opportunities every time an opportunity arises." And so that was our initial change. We look for the opportunity. [36, 2018]  I don’t think [B Corp membership] changed [our] mission. The recording of practices and making those specific decisions about things like health care ... [we] had to make some decisions like that and [we] made some of those to make them line up with the B Corps certification. [17, 2018]  We recently changed broker dealers. We used to be with a very traditional financial services firm ... While we were there, after we became B Corps certified, we started trying to advance our mission more. And we started looking for investment partners that were taking us seriously. And we found them. .... Local investing and thematic investing, using impact themes to select bonds. … It's exactly the kind of thing we're trying to do. And when we went to [our previous broker], we asked them for access to these investments and they refused, so we left. ... [I]t was a massive disruption to our business and it cost us a lot. But ... we could no longer be held back from doing the work that we wanted to do, so it was the only decision to make at that point. And it was really the result of becoming B Corps certified. [5, 2018] |
| Validating | Proving they are enacting organizational values, through membership with prosocial certification | We get business because we are B Corp, because it does send a message that there's a certain level of trust there. It sends the message that we're a firm that's going to do right by you, we're credible, it gives us a lot more credibility in the marketplace. ... I don't think it gives us bigger clients necessarily, but it does give us better clients. [21, 2018]  We're in a rural town and bidding against people from Boston and New York and have the cache of being from high-tech fancy cities. ... We're one of the few firms that I've seen in our industry that actually has [B Corp certification]. ... From our standpoint, it's a badge that I wear proudly and it's on our site and our email signatures. To me and my partner it's something important. ... I don't think [B Corp membership] influenced our mission. I think it generally just aligns so perfectly that it made sense. [14, 2018]  But it is definitely a differentiator in terms of who our sensible competition is. And, recruiting is the kind of thing where a lot of the players are big, multinational global corporations, these huge companies that are really a whole different planet. And so having the B Corp certification is a … nod to … “We're … the homegrown option, the more authentic one.” … It's actually pretty common on both sides [potential clients and employees] … mentioned, “We wanted to reach out to you because you because you’re a B Corp.” Plenty of our B Corp clients explicitly work with us because we're a B Corp. [11, 2024]  With employees, … the kind of people that would be attracted to an ad agency, they're creative people. What we hear all the time is “I want to give back some way.” They're not just saying that. When they get here, they want to volunteer [for instance]. So on the client side… people now know what a B Corp is, thanks to people like Patagonia and Athleta doing a good job of it, at least we don't have to worry about that [any more]. [4, 2024]  [B Corp] is a differentiator. Our mission is around protecting local and regional businesses and helping give them a competitive advantage. That's something that we're all passionate about. And being a B Corp, puts a stamp of approval on that [mission]. [13, 2024] |
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| ***Participating* values work** | Belonging | Fostering sense of fitting in with peer companies with similar values, through membership with prosocial certification | For us, because we have ... that community element in how we describe ourselves ... [B Corp] has been this great way to connect the dots. LA is so spread out and there are so many different pockets of people who are trying to do good. ... [F]or example, we are going to tentatively go to a farm in South LA with all my B Corps people and do an Earth Day project in South LA. I know that folks never get the opportunity to do that or some of them otherwise wouldn’t, so it is a great way to basically build your community of like-minded folks by being a B Corp. [25, 2018]  People in the B-Corp community are more generous in that way, they do want to help support each other. And ... it's B Corp certification giving you that feeling of foundation, and feeling confident, and having something that, quote-unquote, proves your position and gives you legitimacy. And then the rest is sweat equity. [8, 2018]  Being a part of a community, that's the main [benefit]. ... it's hard to meet these people struggling with the same things that you can chat with and you can share your ideas. ... B Corp is for like, "Okay, we're this group of people just hanging out together," in a way. It's as if I would be swimming in the middle of the ocean and be around other people swimming around us, which is emotional support, in a way. ... Where you get to meet the people that are working in something similar to you, or maybe they're not working in something similar, but they're thinking in a similar way.... [B Corp is] a way of getting all those people together. [40, 2018]  We have engaged on the online communities. We had like a email group, Slack group as well with B Corp CEOs. And they have monthly calls [which are] are mostly to keep the networking and lcatch up with everyone. We don't do it every month, because sometimes we're busy. … But yeah, we like to see how people [at other B Corps] are doing from every once in a while. [8, 2024]  We’re in a pretty rural [area] … So it's a relatively small … [and] tight knit group. We don't have a formal chapter or anything like that. … I was unable to attend … a conference that was put on by one of the B Corp members [here]. And the night before the conference, they got all the B Corps got together and had dinner. And, I was sad to miss that, because I've done that a few times. … And sometimes we've had people from the B [Lab], join us for the dinner … but otherwise we just have this informal network of relationships with the other B Corps in the state. And keep keep in touch with them and pick up the phone and talk to them periodically. [10, 2024]  I participate in some networking groups around B Corp certified financial planning, [and] I've been to their Champions Retreat last year. … Actually, at the last conference, I even acquired a new client, he was presenting on sustainable investing from the reporting side, and I was like, “Hey, we should talk about how this looks on the investment side,” and we got talking. It turns out, he was looking for new financial planners. So he came on board, which was really nice. [5, 2024]  We [engage with the B Corp community] lightly. On a passive basis, we get all their newsletters and look at them, some part of our team will participate in the court month and other sort of opportunities to sort of highlight B Corps, we have gone to one or two B Local events. We also have our procurement policies favor … certified B Corps. … We think it's important to be part of the part of the community and part of this movement that's so well aligned with our impact investing offering. So it’s holistic good alignment for our business. [1, 2024]  There's definitely an interest to be engaged in the local B Corp community. But we're doing so many other things to just actually do B Corp type work. And a lot of that is engaging with social justice organizations and the BIPOC community in ways that we weren't before. A lot of that takes time and is pro bono work, and so, in a way, it's like an indirect way that we're engaging. … And that's the work that we like to do. We also are aware that that's was impactful toward our B Corp goals and mission. [12, 2024] |
| Crowdsourc-ing | Adding values held by peer companies in prosocial certification | I'm always interested in learning more about what other B Corps-type companies are doing and are there ideas we can borrow from them or steal from them and do internally. [10, 2018]  I had a call earlier today with my counterparts who manage the sustainability programs at [two other B Corp certified companies]. And these are peers of mine in the industry who I met at the B Corp champion retreat ... It's just good to have a group of peers to cement with and connect with. And [today] we were talking about different challenges we were facing as we're getting our businesses to Zero Waste to Landfill. And different communication strategies with employees around that stuff. And I wouldn't have had that resource had it not been for the B Corp community. [30, 2018]  [We like] the opportunity to be inspired by other businesses, and to hold ourselves accountable to these objective measures. … We are looking at our PTO leave and maternity policies ... [and] we can look to other B Corps … and find out what are they doing? And how can we be more radical and loving? How can we be a more progressive business? And B Lab provides the platform to be able to introduce us to people at those companies if we don't already know them. [30, 2018]  We got a lot of value out of participating in … a couple events B Lab had a couple of years ago, I want to say in 2017, or 2018, this inclusive economy challenge. We connected with a small cohort of people. … There was a range of businesses that were in this little cohort, … and what came out of that work was our development of a full blown DEI initiative strategy. [1, 2024]  We get invited to the Illinois [B Local events] in Chicago, they regularly have virtual meetings. But there there was more of an informal group here in St. Louis, [and] we got together twice last year … just to kind of swap ideas. We're fortunate in the fact that one of our IT consultants is a B Corp too. So that helps a lot to kind of bounce B Corp ideas off of them and figuring things out [for us]. [2, 2024]  We … keep evaluating ourselves as we move along, as in our social and environmental goals. And it's a good way to just check and also reverse engineer, “this is what other people are doing,” what organizations with similar values are doing. [12, 2024] |
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| ***Infusing* values work** | Advocating | Helping grow the movement, through encouraging other companies to join prosocial certification | One of the things that being a B Corp gives you, is a certain amount of street cred, if what you’re deciding to do, is go ... 100 percent towards purpose-driven ... But, really, [certifying] was ... [to] do good work, and help other people who are pulling their oars in the same stream that stream that we are, at the same time. [24, 2018]  B Corp in a way is not only reinforcing for us to do these things, it's also a forum for us to help other companies do these things. In Grand Rapids we have a local group called Local First, and I'm on that committee. ... [W]e are there to support those who want to become [a] B Corp or are B Corps. It’s our way of giving back, and we truly believe that if you can pass the B Corp assessment, you’re doing the right thing, or you’re attempting to do the right thing. [22, 2018]  So just in the last couple years, Impact Hub MSP [B Local group] has been organizing events. So we had a meet up in January at Beehive Marketing, they're certified B Corp. And we have a sort of what would you call it service day where we went last fall and pack food at a big food shelf distribution center. We've been trying to keep up on that stuff. [Through these events] we're growing the community. We've probably had four events total in the last couple years, but it's slowly starting to sort of build momentum. … If we really want to change the dynamics of corporate culture in America, we've got to get everybody on board. And that means starting with the dirtiest and most exploitive industries, and really rewarding companies that want to disrupt that sort of traditional model. [9, 2024] |
| Shaping | Influencing the values espoused by the prosocial certification and member companies | Because B Labs is growing simultaneously with their assessment, there is an opportunity whenever you take the assessments to have a conversation and make a case to get more points on your assessment. It is not this rigid test where you take the impact assessment and that’s it. There is an opportunity to … where maybe the mission doesn’t meet the exact requirements of what a special impact core would be here, but they do XYZ and we don’t have metrics to qualify that XYZ yet. ... You are creating a lot of narratives to support your ... case. [25, 2018]  If we saw that companies that were being admitted and certified as B Corps that were questionable companies, it would concern us deeply. ... [I]f we did notice that the movement went from being responsible ... to "we really want to increase the numbers, and we're going to go about it by lowering our standard," that would be a wake-up call for us. ... knowing [our founder] and his relationship with Jay [Coen Gilbert, co-founder of B Lab], I think that would be a call directly to Jay: “Help me understand why this decision was made, I've got serious concerns.” [22, 2018]  [The certification process] is a give-and-take ... depending on the company and the knowledge base. Let's say you go back three, four, five times sometimes, [B Lab will] say, “I need more data on this question, help me understand why you answered it this way, this is insufficient for me to give you the points for that particular question.” In fact it's a negotiation, a give-and-take because it's not all cut and dry. ... Jay Coen Gilbert is one of the founders of B Corp, and [our founder] and Jay had been good friends. We had great respect for B Corp, and I think they have great respect for us. So, a lot of it was really [them] understanding our business, and why we do the things the way we do. [22, 2018]  The [B Local] cohort program was designed by two past board chairs who have both successfully sold their companies who've been part of the small cohort entrepreneurial groups before. The whole idea behind these cohorts is to bring business owners together to really focus on the hardest – and the best – things that it's really challenging to share with employees or teammates … The emotional health of the business leader really helps shape the health of the company. And so if the leader has a safe, space to be vulnerable, and share and be supported, then it's in the good of the company itself. … And so we have four cohorts, [each of the] cohorts currently have about six to eight business leaders, with a mix of size of company, age …, industry. … And so we do our best to try to keep a very varied groupings. … With my cohort, we meet monthly for four hours, and we have an annual retreat. And there's like an agenda of sharing and updating and coaching and exploring. And then also, we're evolving our time together in a way that suits us as a cohort the best … I really love it. I just emailed my group, because I just got an email from a client and I wanted to get their perspective. You know, they all have businesses like what what do they think about this? And whether they think is a fair cost? And you know, and then I just received quick, amazing feedback. And yeah, so the intention is to have groups stay together for years. [7, 2024] |