

Call for Proposals

A review and synthesis of research and practice: Linking organisations' strategic plans with a shared vision for a sustainable future

Funding: ZAR 250,000 (approx. USD 25,000) (unrestricted), including taxes
Proposal Deadline: 20 October 2013
Project Deadline: 30 September 2014

A. Background and expectations

The Network for Business Sustainability: South Africa (NBS:SA) is an affiliate of the Network for Business Sustainability (NBS), a non-profit organisation founded in Canada in 2005. Through connecting visionary business leaders with global management scholars, NBS creates knowledge tools to enable positive change.¹

NBS:SA bridges the research-practice gap in the South African context. It is a partnership between the Gordon Institute of Business Science (GIBS) at the University of Pretoria and the Graduate School of Business (GSB) at the University of Cape Town.

NBS:SA commissions research projects on themes identified by its Leadership Council² as vital challenges facing South African businesses. These projects have two objectives:

1. Inform sustainable business practice and policy by providing decision-makers with a synthesis of what is known and not known on the topic at hand based on the best available evidence and research.
2. Facilitate the development of future business sustainability knowledge by describing the state of the existing body of literature and identifying important gaps and trends.

Through a review and synthesis of extant scholarly knowledge, these projects provide an opportunity for researchers to shape practice. If the priority themes identified by the NBS:SA Leadership Council have not received much dedicated scholarly attention, researchers are asked to go beyond a systematic review and include the perspectives of key informants in academia, business, government, or civil society. Leadership Council members also request researchers to include case studies that illustrate the concepts and practices discussed in the review, with an emphasis on innovative and inspiring practices.

The final deliverables are disseminated worldwide to researchers and managers through the NBS:SA and its partners.

Past NBS systematic reviews and the resulting executive reports are available on the NBS website. The purpose and process of developing these reviews is discussed by Bansal and colleagues,³ and a guide to preparing systematic reviews is also available on the NBS website.⁴

¹ See <http://nbs.net>.

² The Leadership Council is a group of non-competing companies that help formulate NBS research priorities. They also serve as sounding boards and thought partners for NBS' research community.

B. Project description and key questions

How can business engage in medium- and long-term strategic planning that is linked to a shared vision for a sustainable future (in South Africa)?

What does the future have in store for us? How do we respond in a strategic and pragmatic manner? How can we help shape this future? These are fundamental questions for business strategists. Research from the field of strategic management suggests that companies can enhance their competitiveness through an analysis of long-term trends and their strategic implications.⁵

Tools such as scenario planning are used to understand how organisations can anticipate and react to changing circumstances. Some suggest that they can also help understand how the future can be influenced.⁶ Such medium- and long-range planning is particularly important and difficult in this period of accelerating demographic, economic, environmental and social changes.

This change and uncertainty is prevalent in South Africa 20 years after our first democratic elections. In response, there have been important efforts to help generate a shared, long-term vision for the nation.⁷ Most recently this includes the work of the National Planning Commission, whose National Development Plan has been adopted by the government as an overarching policy framework. At the local level, municipalities' Integrated Development Plans are meant to include the voices of local stakeholders in articulating a local vision and prioritizing development needs.

Yet businesses are often uncertain about their role in the National Development Plan or in local development planning and how such plans can be incorporated into their own strategic management decisions. Guidance is required on how companies can generate organisational visions and plans that reflect organisational priorities and meaningfully intersect with their public counterparts. How can companies' long-term plans better interface with and contribute to the National Development Plan? At the local level, how can companies better support the development and implementation of Integrated Development Plans?

Of course, these plans and scenarios – whether in companies or public collectives – contain a broad array of themes ranging from job creation to climate change. The focus here, however, is not on the content of the plans, but rather on the principles, processes and techniques that can help companies engage in their development. More specific, related questions include:

- What techniques and mechanisms have proven most effective in forecasting and identifying strategic implications for organisations, and how do they compare? What contextual and other factors need to be considered?
- Where and how have such techniques been applied to assist organisations to make prescient strategic decisions in the face of increasing rates of socio-economic, technological, environmental and other changes, as well as high levels of uncertainty ?

³ Bansal, P., Bertels, S., Ewart, T., MacConnachie, P. and O'Brien, J. (2012). Bridging the research-practice gap. *Academy of Management Perspectives*, 26(1), 73-92.

⁴ See <http://www.nbs.net/wp-content/uploads/Guide-to-NBS-Systematic-Reviews.pdf>.

⁵ Phelps, R., Chan, C. and Kapsalis, S.C. (2001). Does scenario planning affect performance? Two exploratory studies. *Journal of Business Research*, 51(3), 223-232.

⁶ Kahane, A. (2012). *Transformative scenario planning: Working together to change the future*. San Francisco: Berrett-Koehler.

⁷ For instance, the Mbeki government published in 2008 "South Africa Scenarios 2025: The future we chose?" and the Dinokeng scenarios were widely discussed a year later (see <http://www.dinokengscenarios.co.za>).

- How can scenarios and medium- and long-range planning help companies respond to growing sustainability challenges?
- When and how can organisations aim to not only respond to scenarios of the future, but engage in concerted, collaborative efforts to influence these trajectories?
- How can companies create effective synergies between their long-range plans and collective plans and visions (at local or national levels)?

C. Project outcome

The primary deliverables are as follows:

- An **executive report** that synthesises key findings of the research and highlights implications for decision-makers. It should include, if and as appropriate, the model or framework that synthesises extant knowledge for the purpose of decision-making.
- The **systematic review report**, which includes:
 - o The systematic review of the scholarly literature – this will constitute the bulk of the report;
 - o Discussion of the model, framework, or decision support tool that synthesises extant knowledge for the purpose of decision-making;
 - o If and as appropriate, a synthesis of findings from key informant interviews;
 - o Illustrative case studies; and
 - o Methods (in annex).

The systematic review should synthesise the body of evidence and identify gaps in the literature.⁸ The synthesis should feature a framework, model, or decision support tool that provides a creative link between the synthesised scholarly knowledge and decision-making needs of executives. An example of this is the “culture wheel” developed by Bertels in her review on embedding sustainability into corporate culture.⁹

Total length of the report should be between 30-50 single-spaced pages plus appendices (methodology, systematic descriptive mapping of the body of knowledge, references, etc.). Any publications or presentations stemming from this work must acknowledge NBS:SA. The report should be submitted in English in Microsoft Word formats.

The process will involve consultation with the Guidance Committee that is comprised of managers and an academic advisor. The research team will also be invited to dialogue with managers about their research, which will contribute to the validity of the findings.

⁸ See *Guide to NBS Systematic Reviews* for details (<http://www.nbs.net/wp-content/uploads/Guide-to-NBS-Systematic-Reviews.pdf>)

⁹ Available via <http://nbs.net/knowledge/topic-culture/culture/systematic-review>.

D. Project deliverables and proposed schedule

The following table includes tentative deadlines for each of the deliverables and other key activities. The final schedule may be refined through discussion with the selected research team.

Deliverables and Other Activities	Tentative Deadlines¹⁰
1. Define research question in a conference call with NBS:SA and Guidance Committee	November 2013
2. Develop and justify the review methodologies (general literature review and systematic review) and receive input from NBS:SA and academic advisor	December 2013
3. Conduct literature search and apply eligibility criteria	January 2014
4. Conference call with NBS:SA and Guidance Committee	January 2014
5. Read, analyze and assess quality of studies in the review	January - March 2014
6. Submit brief written progress report and extracted data to NBS:SA; conference call with NBS:SA and Guidance Committee. Second instalment of funds will be released based on adequate progress	April 2014
7. Synthesize the review findings into a framework	May 2014
8. Conduct interviews with organisations to develop case studies, and conduct interviews with key informants (if and as appropriate)	May-June 2014
9. Discuss the emerging framework in a conference call with NBS:SA and Guidance Committee	June 2014
10. Finalize synthesis, write report and submit first draft to NBS for review	June-July 2014
11. Discuss report on conference call with NBS and Guidance Committee	August 2014 September 2014
12. Participate in NBS:SA workshop to discuss findings with Leadership Council members and others	
13. Submit final report to NBS:SA	September 2014

F. Funding

The funding for this project is ZAR 250,000 (approx. USD 25,000) including taxes, in unrestricted funds to be granted in three stages contingent upon satisfactory progress determined by NBS:SA review. The funds will be distributed according to the following schedule: ZAR 100,000 upon acceptance of the project, ZAR 50,000 on submission of the first draft and ZAR100,000 upon successful completion. In addition, a travel supplement will be provided to cover travel and accommodation to one NBS:SA event in Johannesburg, South Africa, that the lead researcher will be expected to attend. (Note that some universities deduct “overhead” from all incoming funds.)

G. Eligibility

Anyone is eligible to respond to this Call. Interested applicants should bear in mind that to conduct a systematic review successfully requires strong capabilities with and extensive experience in conducting and reviewing academic research.

¹⁰ May be negotiated with Guidance Committee and NBS:SA.

NBS:SA and its Leadership Council emphasise the need for this research project to take into account the South African and southern African context. Applicants should demonstrate a keen knowledge of this context. We also want to encourage in particular international collaborative teams involving southern African researchers.

H. Proposal requirements and criteria for evaluation

Proposals

The project will be conducted in English. All proposals and project deliverables must be written in English and all oral communications throughout the project, including conference calls with the Guidance Committee, will be conducted in English.

Proposals must have one lead researcher, who is solely accountable for the deliverables and who is the main point of contact for the project. For training purposes, we encourage applicants to involve graduate students in the project. The research team may also include research associates and other partners.

Proposals should be limited to the following sections:

1. **Impacts, Knowledge, and Activities** (no more than 1,500 words)
 - a. The envisioned impacts from the project. For example, who will be impacted by the knowledge? What will they do with it? Will you seek additional publishing opportunities arising from this work, and if so, where?
 - b. Details of the body of knowledge that you feel are relevant to the question and that you will synthesize. Applicants are encouraged to scope the existing literature briefly to inform their proposal content and scope.
 - c. A very rough, preliminary protocol for the project.¹¹ We encourage you to not merely repeat the process in these documents, but focus on the aspects unique to this project.
2. **Team Expertise** (no more than 500 words per researcher)

Description of the specific experience and expertise of each team member as it relates to this project. It is important to show that the research team has both the skills necessary to understand the academic research and those required to communicate knowledge effectively to practitioners.
3. **Curricula Vitae for all members of the research team**

Submission

Proposals must be submitted in Microsoft Word format to Kristy Faccor (kfaccor@nbs.net) by 20 October 2013. Winning proposals will be announced within two weeks. Proposals may be made publicly available after the competition has closed.

Evaluation

Proposals will be evaluated by the Guidance Committee comprised of selected members of the NBS:SA Leadership Council. This Committee will also help scope the project with the research team and guide it throughout the process.

The evaluation criteria are:

1. Understanding of the project question and knowledge of the relevant literatures.

¹¹ See *Guide to NBS Systematic Reviews* for details on the systematic review (<http://www.nbs.net/wp-content/uploads/Guide-to-NBS-Systematic-Reviews.pdf>)



2. Appropriateness of preliminary protocol.
3. Ability to read and evaluate peer-reviewed academic research as well as practitioner materials; experience with interviews.
4. Ability and plan to communicate to and impact practitioner audiences.
5. Team expertise and experience, including insights into the South African and southern African context.