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Marketing Planning for Social Entrepreneurial Organizations in the Context of Subsistence Marketplaces: A Pedagogical Reflection for Marketing Education in Jesuit Business Schools

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A PEDAGOGICAL REFLECTION FOR MARKETING EDUCATION IN JESUIT BUSINESS SCHOOLS

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Abstract

Marketing education in Jesuit business schools, as in most other business schools, is mainly oriented towards traditional for-profit business enterprises. Over the last decade interest has grown in the field of social entrepreneurship and in the management of social entrepreneurial organizations (SEOs). By including an emphasis on SEOs, with their primary focus on social and environmental impact, Jesuit business schools can reposition themselves in a way that places considerable emphasis on social and ecological concerns. Such an orientation is in keeping with the Jesuit tradition particularly as articulated in the last few general congregations of the Jesuits. A primary question that we explore is: does marketing planning for SEOs, especially those that operate in the context of subsistence marketplaces, differ from that of traditional for-profit business enterprises? If so, how might Jesuit business education, specifically with regard to marketing education, be modified so as to also apply to SEOs? Further, how does our identity as Catholic, Jesuit institutions influence our offering and distinguish it from that offered at secular institutions?

Despite the American Marketing Association's (2007) attempt at defining marketing in more inclusive terms so as to accommodate other entities such as nonprofits, government organizations, and social enterprises,¹ marketing education in business schools continues to be dominated by the for-profit business model. Andreasen (2012, p. 37) points out that "textbooks in the field also reflect the dominance of a business mind-set in their chapter structure and allocation of space."

In recent years, there has been a growing interest in the field of social entrepreneurship and subsequently the number of institutions offering programs in this field has grown phenomenally. According to Kim and Leu (2011) from Ashoka-U, as of 2011, over 148 institutions globally were teaching some aspect of social entrepreneurship. Courses at the top MBA schools that included social benefit content increased 110 percent on average between 2003 and 2009. Milway and Goulay (2013) point out that:

MBA programs today are minting not just captains of industry, but also crusaders for social good. Any program teaching business skills needs to train their graduates to serve both companies and society.....Steeped in both social and business principles this new breed of MBAs will be able to navigate complexity and create opportunities to sustain the world we live and work in.

While there is much that traditional entrepreneurship shares with social entrepreneurship, some argue that what distinguishes the latter from the former is that social benefit and social mission achievement are the central concerns for social entrepreneurs (Kickul & Lyons, 2012). As there is much confusion in the field of social entrepreneurship with regard to what exactly constitutes its domain, we prefer to use the term “social entrepreneurial organization.” We view a social entrepreneurial organization (SEO) as “one that aims at co-creating social and/or ecological value by providing innovative and lasting solutions to social and/or environmental problems through a process of empowerment and in a financially sustainable manner” (Santos, 2013, p. 39). Viewed from this perspective, almost any organization – for-profit (private, publicly traded, family owned), co-operative, non-profit, social enterprise, governmental organization, hybrid organization – can be a social entrepreneurial organization provided it adheres to the characteristics specified in the above definition (cf. Keohane, 2013). In our opinion, Jesuit business education should include an orientation towards SEOs, particularly those operating in subsistence marketplaces. Positioning Jesuit business education in this way is consistent with core Jesuit values, especially as espoused in recent Jesuit documents, and contributes to a unique brand identity (Facca, Schmidt, & Soper, 2013).

In this paper we focus on a subset of business education, namely, Marketing Planning. We begin by first re-examining Jesuit business education in light of recent Jesuit documents, particularly the most recent General Congregation of the Society of Jesus and speeches of the Jesuit Superior General focused on Jesuit higher education. We then delineate the space occupied by SEOs operating in subsistence

marketplaces and compare this with SEOs in non-subsistence marketplaces. Such an elaboration enables us to raise the question whether marketing planning for SEOs in subsistence marketplaces will be different from the traditional marketing planning as currently taught in Jesuit business schools. Finally, we offer some pedagogical suggestions and highlight avenues for further research.

Re-creating Jesuit Business Education

At the conclusion of his address to the delegates at the Networking Jesuit Higher Education conference in Mexico City in 2010, Father Adolfo Nicolas, Superior General of the Society of Jesus, asks: "What kind of universities, with what emphases and what directions, would we run, if we were re-founding the Society of Jesus in today's world?" (Nicolas, 2010, p. 12). Father Nicolas adds: "if we lost the ability to re-create, we have lost the spirit." In light of this invitation it is only appropriate that we re-examine Jesuit business education and ask ourselves what kind of business schools, "with what emphases and what directions, would we run" if we were starting anew?

The thirty-fifth general congregation of the Society of Jesus points out "the new context in which we live our mission today is marked by profound changes, acute conflicts, and new possibilities" (Padberg, 2009, p. 745). And, further:

In this new world of instant communication and digital technology, of worldwide markets, and of a universal aspiration for peace and well being, we are faced with growing tensions and paradoxes: we live in a culture that shows partiality to autonomy and the present, and yet we have a world so much in need of building a future in solidarity; we have better ways of communication but often experience isolation and exclusion; some have greatly benefited, while others have been marginalized and excluded; our world is increasingly transnational, and yet it needs to affirm and protect local and particular identities; our scientific knowledge has reached the deepest mysteries of life, and yet the very dignity of life itself and the world we live in are threatened (p. 746).

Echoing Pope Benedict's sentiments in the encyclical *Caritas in Veritate*, Father Nicolas (2009, p. 39) in his keynote address on the 150th anniversary of Jesuit Education in the Philippines points out that "the present world economic crisis and the continued suffering of millions reveals to us that many of our old solutions do not work, and require new solutions based on deeper, more adequate, more creative ways of understanding the many complex realities of human life and the world."

Devising new solutions to the social and environmental problems of our time is something more proper to social entrepreneurial organizations. We, therefore, argue that if we were to re-create Jesuit business education today, we would structure it in a way that it includes an orientation towards social entrepreneurial organizations and not only traditional for-profit businesses. McCallum, Connor, and Horian (2012) point out that b-school graduates are not just concerned about getting a job but also of making a difference in the world. They further add that “many conscientious young people want to be part of transformative change that leverages resources toward making a difference for a greater number of people, including those who are poor or marginalized” and raise the question whether “traditional b-schools prepare students for the broader role of leader, change-agent, visionary.” We agree with Mintzberg (2004) and Bennis and O’Toole (2005) and other critics of business education who conclude that traditional b-schools are not successful at preparing students for this broader role and that the narrow focus on for-profit businesses constrains the students from looking at a bigger picture. Including an orientation towards social entrepreneurial organizations will enable us to broaden our horizon (Santos, 2012). We additionally propose that social entrepreneurial organizations that operate in subsistence marketplaces offer an opportunity of visioning Jesuit business education along the lines of the Jesuit preferential option for the poor.

Social Entrepreneurial Organizations in Subsistence Marketplaces

Subsistence marketplaces are comprised of the roughly four billion people living on less than \$2 a day, a population often referred to as the bottom or base of the pyramid (Hammond, Kramer, Katz, Tran, & Walker, 2007; Prahalad, 2005; Viswanathan & Rosa, 2007; Viswanathan & Sridharan, 2009). While this population often struggles to make ends meet, subsistence marketplaces “often have rich, culture-specific, pre-existing traditions of economic exchanges.” Therefore, they should be viewed “not just as markets to sell to, but as individuals, communities, consumers, entrepreneurs, and markets *to learn from*” (Viswanathan & Rosa, 2007).

Schoar (2009) draws a distinction between subsistence entrepreneurs and transformational entrepreneurs. According to Schoar, subsistence entrepreneurs aim to earn subsistence income, that is, income to meet theirs and their family’s daily needs. Whereas, transformational entrepreneurs “aim to create large, vibrant businesses that grow much beyond the scope of an individual’s subsistence needs and provide jobs and income for others.” We, likewise, draw a distinction between subsistence entrepreneurs and social entrepreneurs. The latter are the main drivers of SEOs and are focused on devising and implementing innovative and lasting solutions to social and environmental problems. As the bulk of social problems in particular are present in

subsistence marketplaces, the domain of operation for SEOs is mostly such a marketplace. However, SEOs can also operate in a non-subsistence marketplace. The examples in the following paragraphs will illustrate this difference.

A sari-sari store in the Philippines is a micro-retail outlet, mostly operated by a woman entrepreneur from her home. A sari-sari store owner is an example of a subsistence entrepreneur. As of 2011, there were over 800,000 such sari-sari stores in the Philippines (CSTS at Santa Clara University, 2011) compared to 240,000 in 1972 (Dannhaeuser, 1980). While this might appear to be phenomenal growth over a span of 40 years, it masks the high failure rate of the sari-sari stores. One of the main reasons for this is poor financial management (Arceo-Dumlao, 2012). Hapinoy is an initiative of Microventures Inc. (for-profit) and Microventures foundation (non-profit) that creates an enabling environment for the sari-sari stores to function more efficiently. It does this at two levels: on one level, it provides education, access to capital, innovative solutions and products, and at another level, it creates a community of entrepreneurs helping to create a network of stores rather than stores that function in isolation (Happinoy, 2013). In our opinion, the Hapinoy initiative is an example of a social entrepreneurial initiative. This program attempts to find lasting and innovative solutions to some of the problems facing sari-sari store owners, empowering sari-sari entrepreneurs to achieve financial sustainability.

“Crisis Action” is an initiative started by Gemma Mortensen in 2004. The initiative received a Skoll Foundation Award in 2013 (Skoll Foundation, 2013). Crisis Action acts as a catalyst and coordinator bringing human rights and humanitarian organizations together to advocate on behalf of civil society, thus spurring the world’s most powerful decision makers into action. In the eight years of its existence, Crisis Action, through its collective advocacy approach, has helped save thousands of lives. It “has helped to: secure one of the largest UN peacekeeping forces for Darfur, Sudan; prevent Zimbabwean President Mugabe from torturing civilians by stopping the supply of bank paper to the regime; and convince the Arab League to respond to mass violence against civilians in Libya and Syria.” We would consider Crisis Action to be a social entrepreneurial initiative in a nonsubsistence marketplace, though many of those who benefit from their efforts are undoubtedly likely to be among the subsistence population.

Marketing Planning for SEOs in Subsistence Marketplaces

Traditional marketing planning (TMP) for for-profit enterprises consists of three main phases: planning, implementation, and control (Grewal & Levy, 2013). Planning consists of defining the business mission and objectives and conducting a situation analysis, wherein one assesses factors that can affect the firm’s success that are internal

(strengths and weaknesses) and external (opportunities and threats) to the firm. In the implementation phase, a firm identifies opportunities through the process of segmentation, targeting, and positioning and implements the marketing mix, consisting of product, price, place, and promotion. In the control phase, a firm evaluates the performance of the marketing strategy using marketing metrics. Whalen and Holloway (2012) argue that traditional marketing planning is not well suited for new ventures and instead propose effectual marketing planning (EMP) that “uses a different set of management processes focused on speedy action, learning through failure, and a premeditated approach to market experimentation that creates instant feedback.”

A drawback of TMP and EMP strategies is that they are both top-down approaches with senior management determining what these strategies are. Such an approach does not work in the base-of-the-pyramid market, where there is a need for a more participatory approach and co-creation rather than value determination (Hart, 2007; Prahalad, 2005). Weidner, Rosa, and Viswanathan (2010, p. 562) and colleagues suggest a set of unique business practices for firms that operate in subsistence marketplaces. As such, these practices would be applicable to SEOs operating in subsistence marketplaces. These marketing practices are:

1. Researching and understanding subsistence marketplaces
2. Identifying critical needs
3. Negotiating social networks
4. Designing the value proposition
5. Co-creating products in subsistence marketplaces
6. Localizing production
7. Developing sustainable packaging
8. Communicating to subsistence consumers
9. Providing access to products in subsistence marketplaces
10. Managing adoption processes in subsistence marketplaces

Weidner et al. (2010) derive these practices based on an examination of companies that operate successfully in subsistence marketplaces. But what does it mean to be successful? We propose complementing the positive approach of Weidner et al. with a normative ethical framework for marketing to impoverished populations. In the context of multinational corporations (MNCs) marketing within the base-of-the-pyramid market, Santos and Laczniak (2009) propose the integrative justice model (IJM) that they develop from various strands of thought in moral philosophy, religious doctrine and enlightened management theory. The key elements of the IJM are:

- A. Authentic engagement with consumers, particularly impoverished ones, with non-exploitative intent;
- B. Co-creation of value with customers, especially those who are impoverished or disadvantaged;
- C. Investment in future consumption without endangering the environment;
- D. Interest representation of all stakeholders, particularly impoverished customers;
- E. Focus on long-term profit management rather than on short-term profit maximization.

Subsequently, in the context of social entrepreneurial organizations, Santos (2013) modifies the key elements as follows:

- a) Authentic engagement aimed at *empowerment* particularly of disadvantaged groups;
- b) Social and environmental value co-creation aimed at *solving the root causes* of problems associated with poverty;
- c) Creation of *sustainable ecosystems* through a process of innovative social change;
- d) Interest representation of all stakeholders, particularly impoverished and disadvantaged segments;
- e) *Financial* viability and sustainability.

The aim of the IJM, whether for MNCs or SEOs, is to stipulate ethical benchmarks of a fair and just marketplace where the poor do indeed benefit from entrepreneurial activity by these organizations, particularly in subsistence marketplaces. This is not to imply that the practices that Weidner et al. propose do not help create a fair and just marketplace. In fact, there is much in common between both perspectives (see Table 1). Researching subsistence marketplaces, identifying critical needs and negotiating social networks are indicative of an authentic engagement with subsistence populations. Designing the value proposition and co-creating products help in co-creating social and environmental value. Localizing production and developing sustainable packaging help create sustainable ecosystems. Communicating to consumers and providing access to products and services are indicative of an interest representation of subsistence stakeholders. And managing the adoption process helps in ensuring financial viability and sustainability. In the following section, we reflect on the pedagogical implications of marketing education including a focus on SEOs who operate in subsistence marketplaces.

A Pedagogical Reflection

As mentioned earlier, traditional business education has been oriented towards for-profit business organizations operating in high and middle-income markets. If Jesuit business education in general, and marketing education in particular, is to include an orientation towards SEOs operating in subsistence marketplaces, then the content as well as our process of education delivery needs to be adapted to include such marketplaces. This is important as the characteristics of subsistence marketplaces differ from those of high and middle-income markets (Viswanathan & Rosa, 2010; Viswanathan & Sridharan, 2009; Weidner et al., 2010). As such, the managerial implications for marketing in these marketplaces as well as the tactics for marketing planning will be different (see Table 1). Fortunately, there is no need to re-invent the wheel, as there is already a rich body of practical knowledge on which to draw. The Subsistence Marketplaces Initiative at the University of Illinois at Urbana-Champaign has generated an abundance of bottom-up knowledge of subsistence marketplaces as well as curriculum material at both the undergraduate and graduate levels (College of Business at the University of Illinois, 2013; Rosa, Viswanathan, & Ruth, 2008).

There are also the grounded learning approaches for social value creation such as the “Edun Live on Campus” initiative at Miami University (Farmer School of Business at Miami University, 2013; Smith, Barr, Barbosa, & Kickul, 2008). Grounded approaches, initially suggested by Glaser and Strauss in the 1960s, enable the researcher to collect qualitative data on a subject or experience, categorize it, then form concepts and ultimately generate theory to explain the subject or experience (see Glaser, 1992; Strauss, 1987). Grounded learning coincides nicely with Ignatian pedagogy in which the student is “challenged to appropriate his or her own process of knowing” (Loyola University Chicago, 2014). Applying the grounded learning approach is made easier by the extensive network of Jesuit grass-roots organizations that work for social justice and the ecology (Society of Jesus, 2013). Collaborating with this network will enable us to offer an education that is practical and meaningful. Imagine the increased practical value of immersion trips, well developed in Jesuit universities, which enable students and their faculty leaders to fully “immerse” in the day to day life of the impoverished, when the tenets of Ignatian pedagogy are applied. For example, John Carroll University’s Boler School of Business offers a three credit-hour elective in which students first study the social and economic *context* of Honduras, then over spring break participate in an immersion *experience*, teaching business skills and entrepreneurship to Honduran teenagers (John Carroll University, 2014). The students return to the classroom to *reflect* on the experience, developing *actions* for future courses. Alongside the

students, faculty participants continually *evaluate* Honduran problems, options, and potential remedies, much as an SEO would, and aim to improve the effectiveness of the grounded learning experience each year for both the students and the Honduran teens. Likewise, the Global Social Benefit Fellowship program at Santa Clara university combines a “6-7 week international summer field experience in the developing world with two quarters of academically rigorous research” (Santa Clara University, 2014).

Moving from an exclusive focus on for-profit organizations towards an approach that includes an orientation towards SEOs is bound to be fraught with challenges. For one, an important goal of imparting business education to our students is to enable them to find careers in the business world. One could legitimately ask whether a business education that includes an orientation towards SEOs in subsistence marketplaces would help our students find jobs or careers in enterprises that do not share this orientation or that do not operate in this space. We hold this to be a valid concern but also wish to point out that the skills and creativity learned in focusing on a challenging environment such as subsistence marketplaces are bound to help our students navigate the relatively less challenging non-subsistence marketplaces as well. Consider the case of the Corporate Service Corps (CSC) program that IBM launched in 2008 where IBM employees were sent in groups of about 10-15 to communities in emerging markets (IBM, 2013). While this program was able to deliver high quality solutions to problems in local communities, it also enabled IBM’s employees to develop a better understanding of the situation in these communities (Hamm, 2009).

Another challenge will be to get the faculty on board. For one, as traditional business education has focused on for-profit business enterprises in high and middle-income markets, the academic qualifications of most of the b-school faculty are in these areas. In other words, currently there are not many faculty with expertise in subsistence marketplaces. Further, as most publications are still oriented towards for-profit businesses that operate in high and middle-income markets, faculty might be reluctant to teach courses in an area where the possibility of publication is substantially reduced. We hold this to be a genuine challenge with no easy answer; but not an impossible one. A case in point is the enthusiasm that has been generated among students and faculty around the subsistence marketplace initiative, mentioned earlier, at the University of Illinois at Urbana-Champaign (College of Business at the University of Illinois, 2013). This support has spread to other institutions as well. Loyola University Chicago, a Jesuit University, was a co-organizer of the fourth subsistence marketplace conference held in July 2012, together with Monash University, Australia and University of Illinois (Quinlan School of Business at Loyola University Chicago, 2012).

Additionally, in terms of an ethical approach to subsistence marketplaces, the Integrative Justice Model (IJM), discussed earlier, can be employed by faculty as a practical and easily digestible framework for teaching marketing planning. For example, at John Carroll University, the IJM is interwoven into the marketing capstone course which features experiential learning projects in which students work with outside organizations to co-create value with consumers. Topics include sustainable marketing, the service-dominant logic of marketing, value co-creation with stakeholders, and managerial perspectives based on Jesuit traditions. The IJM is presented as a normative framework for justice in marketing. Each tenet of the IJM is paired with concepts from sustainable marketing (see Table 2).

While some faculty will be open and perhaps even eager to include a focus on SEOs in subsistence marketplaces in their course offerings, as a matter of principle, there should be certain incentives offered to faculty for such incorporation. Such incentives can be mini grants offered by the Center of Entrepreneurship (where such exist) or the dean's office. Alternately, departments could be granted a certain budget for faculty who revise their syllabi to include SEOs in subsistence marketplaces.

While the faculty will undoubtedly be the major drivers of change towards an education model that includes SEOs in subsistence marketplaces, there is need for support and direction from the higher echelons of power in the b-school, including the dean, assistant deans and department chairs. Unless these are committed to transitioning to an education model that includes socially entrepreneurial organizations, interested faculty members will find themselves devoid of a support mechanism to further their pedagogical explorations in this direction.

Conclusion

In this paper we have argued for an alternative paradigm of Jesuit business education. In response to the call of the superior general of the Society of Jesus to be creative and to think anew, we have proposed that Jesuit business education be reconfigured to include an orientation towards socially entrepreneurial organizations rather than the traditional exclusive focus on for-profit business enterprises. Focusing on marketing education in particular, we have proposed building on existing work such as the subsistence marketplaces initiative and using approaches such as the grounded learning approach. We offer tactics for marketing planning for social entrepreneurial organizations (Table 1). These are based on the normative integrative justice model of Santos and Laczniak (2009) and the positive marketing strategies that Weidner, Rosa, and Viswanathan (2010) offer. We propose developing curriculum around these tactics. It is our hope that faculty in Jesuit business schools will experiment with incorporating some of these marketing strategies for SEOs into

their course offerings. We also hope that such efforts by faculty will be supported by administrative policies.

Shifting the focus of Jesuit business education to include socially entrepreneurial organizations is not going to be an easy transition and will be fraught with challenges. However, we believe that such a shift in focus will enable us to better position Jesuit business education as one that is deliberately oriented towards making the world a better place for all of us. This perspective will add to the competitive advantage we already possess in terms of focusing on the whole person and on reflective thinking (Leggio, 2013). Further, such an approach will help us to develop a unique brand identity of Jesuit business education (cf. Facca et al., 2013).

TABLE 1: IJM Adaptations for Social Entrepreneurship Marketing (Facca-Miess & Santos, forthcoming)

IJM for MNCs (Santos & Laczniak, 2009)	IJM for SEOs (Santos, 2013)	Marketing in Subsistence Marketplaces (Weidner et al., 2010)		Tactics for Marketing Planning in Subsistence Marketplaces
		Process Step	Managerial Implications	
Authentic engagement with consumers, particularly impoverished ones, with non-exploitative intent	Authentic engagement aimed at empowerment particularly of disadvantaged groups	1. Research markets 2. ID critical needs 3. Negotiate social networks	<ul style="list-style-type: none"> Participatory research ID needs of value chain Harness 1-1 interactions & rich social networks 	<ul style="list-style-type: none"> Cultural immersion experiences Build trust with transparency in value chain Understand political environment, rights and resources
Co-creation of value with customers, especially those who are impoverished or disadvantaged	Social and environmental value co-creation aimed at solving the root causes of problems associated with poverty	4. Design value proposition 5. Co-create products (and services)	<ul style="list-style-type: none"> Challenge and rethink traditional business Understand & incorporate consumer needs 	<ul style="list-style-type: none"> Extensive small group discussions with potential beneficiaries on problem identification Identify leaders, evaluate social capital Co-create innovative solutions by segment Include beneficiaries' recommendations in solution processes
Investment in future consumption without endangering the environment	Creation of sustainable ecosystems through a process of innovative social change	6. Localize production 7. Develop sustainable packaging	<ul style="list-style-type: none"> Increase livelihood opportunities, awareness, networking Reduce transportation costs Increase product/svc. transportability Use biodegradable or recyclable local materials 	<ul style="list-style-type: none"> ID subsistence market segments Map product/service life cycle – understand consequences & opportunities Increase capabilities for participation (education, business skills, customer service training) Disintermediation
Interest representation of all stakeholders, particularly impoverished customers	Interest representation of all stakeholders, particularly impoverished and disadvantaged segments	8. Communicate to consumers 9. Provide access to products/services	<ul style="list-style-type: none"> Innovative communication through brand name selection Demos and WOM advertising, local partners Enlist local resellers to provide access 	<ul style="list-style-type: none"> Clarify stakeholder advantages Develop stakeholder strategies that ensure ethical economic exchange to benefit all Develop metrics to ensure sustained advantages Conduct ethics audits through group meetings
Focus on long-term profit management rather than on short-term profit maximization	Financial viability and sustainability	10. Manage the adoption process	<ul style="list-style-type: none"> Tailor solutions around high interdependence 1 on 1 interactions 	<ul style="list-style-type: none"> Evaluate social, economic and environmental sustainability initiatives Develop strategic plan with long-term focus and timeline for implementation Develop and monitor co-created metrics particular to organization

**TABLE 2: IJM Elements Incorporated into Marketing Class
John Carroll University**

Marketing Topics	IJM Elements
Consumer Behavior and Marketing Ethics	IJM is introduced.
Measurement and Research for Engagement	IJM element: Authentic Sustainable Marketing
Market Segmentation, Targeting, And Positioning For Sustainability	IJM element: Value Co-creation
Global Problems, Global Opportunities	IJM element: Interest representation vof stakeholders
Sustainable Products and Services Profit Management	IJM element: Long term Sustainability

Notes

1. The 2007 AMA definition of marketing: "Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, marketers, and society at large."

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