

***Advancing Social Purpose in College and Institute Administration and Finance Functions
to Strengthen Social Infrastructure in Canada***

College and Institute Chief Administrative and Financial Officer Roundtable Discussion

Burnaby, BC – May 2, 2018

Aide-Mémoire

Introduction and Background

On May 2, 2018 BCIT and the [McConnell Foundation](#) hosted a Roundtable Discussion with three college and institute administrators based in Greater Vancouver, for the purposes of discussing trends, barriers and opportunities in social purpose administration and finance within the colleges and institutes sector. Administrators from the [BC Association of Universities and Institutes](#) were invited.

The discussion was based on a 2017 [white paper](#) commissioned by McConnell Foundation in collaboration with Simon Fraser University that set out the case that universities, colleges and polytechnic institutes have capacities and assets that can be unlocked to increase societal well-being.

The paper offers a typology of instruments that institutions can harness to create greater social impact in communities and beyond. Among these are a range of physical and financial assets, many of which are administered by administration and finance departments of colleges and universities. McConnell refers to the idea of generating social impact from administration and finance functions as “Social Purpose Finance and Administration”.

The Foundation is currently partnering with the Canadian Association of University Business Officers (CAUBO) on a 2018 project to understand the merits, opportunities and challenges of building social purpose administration capacity, and to identify opportunities for collaboration and cross-fertilization among post-secondary institutions. The partners are also creating an inventory of practices and initiatives that illustrate social purpose finance and administration in action. This short paper “[Social Purpose Administration Primer](#)”, provides an at-a-glance overview and some examples compiled to date.

The purpose of the Roundtable Discussion was to update senior college administrators on McConnell’s efforts to accelerate and scale social innovation through administration and finance departments in higher education, to share recent and current efforts among colleges and institutes and identify sector-wide opportunities to address barriers and pursue innovations to contribute to societal well-being through college administration functions. This memo summarizes the feedback, challenges, and collaboration opportunities identified in the meeting.

A list of participants is included in Appendix A.

Feedback

- The time has come to use our assets more
- There are higher and higher community expectations
- It is a very doable initiative to have it fully embedded, not treated as a one-time thing
- The vast majority of PSE would be open to it, however, administrators have many other current priorities and are not sure how to operationalize it
- Examples are helpful; once doable ideas are shared it will become institutionalized in the way we work; there is huge value in sharing examples of what others are doing and what works
- Students need to be part of the mix; we do a lot of things with the student association; students want to go to a place that is giving back to the community; however, not all institutions have student associations
- Smaller satellite campuses might have a unique/local social impact agenda which may be different from the main campus and can be a source of innovations and new ideas

Challenges

- Sustainable procurement is very difficult and adds layers of complexity; we are often focused on the lowest bidder; perhaps BCNET (BC shared services group for post-secondary institutions) could be the central body to advance some ideas; perhaps sustainable procurement could be advanced through indirect procurement via RFPs
- Finding appropriate community organizations to partner with?
- We are highly decentralized; how do you influence the whole organization in a decentralized model?
- Identifying helpful pathways and roadmaps for constructively engaging with Provincial governments
- Governance of this idea needs to be more fully formed; as there needs to be a balance between actually achieving outcomes and the related effort that is needed for reporting out internally and externally
- Don't want to be doing more reports; better to put successes in stories

Collaboration Opportunities

- **Other groups to engage:** BC Senior Financial Administration Officers Group would be a good group to engage on these ideas. Research Universities could be another opportunity. The BC Association of Universities and Institutes, invited to the discussion, could be further engaged
- **Easy wins for early adopters and fast-followers:** Focus on a few areas for collaborating; pursue easy wins; identify low-hanging fruit; create a fast-follower dynamic (peer pressure)
- **Operational planning:** Help institutions think of how they can include these ideas in their operational plans rather than strategic plans; it is easier to put bite-sized pieces into operational plans
- **Values activation:** Demonstrate how it can be embedded into organizational values, so it can be integrated into current every day practices
- **Organizational awareness:** Raise awareness of this idea through VP champions, this means it is sanctioned by the organization. Training and capacity building for administration staff is not needed

- **Partnership brokering:** Tendency to risk aversion can be overcome through partnerships
- **Provincial advocacy:** Perhaps McConnell Foundation could play an advocacy role with the Province to promote a social impact / innovation mandate for institutions

Next Steps

- McConnell will provide the example practices survey link so that examples can be shared ([link](#))
- McConnell will summarize the feedback and input and share with participants
- Participants are encouraged to attend the CAUBO workshops (or have staff attend) on Tuesday June 12 in the afternoon (1:30 – 4:30)
- Participants are encouraged to contact Chad Lubelsky if they have other ideas or opportunities they recommend McConnell pursue (clubelsky@mccconnellfoundation.ca)
- Participants are encouraged to raise this idea with their teams and find champions. SFU is testing a one-hour discussion model for leadership teams. If you are interested in replicating this session, contact Chad. In the meantime, the original [white paper](#) and the [social purpose administration primer](#) are useful resources for teams to get them thinking of these opportunities
- The database will be shared once the submission process is complete, date TBD

Appendix 1 – List of Roundtable participants

College / Institute Representatives

Lorcan O'Melinn
Vice President, Administration and CFO
BC Institute of Technology

Jacqui Stewart
Vice President, Finance and Administration
Capilano University

Kayoko Takeuchi
Vice President, Finance and Operations
Justice Institute of BC

Fondation McConnell Foundation

Chad Lubelsky
Program Director
McConnell Foundation

Coro Strandberg
Social Purpose Administration Advisor
RECODE, McConnell Foundation