Advancing Social Purpose in Advanced Education Administration and Finance Functions to Strengthen Social Infrastructure in Canada

CAUBO 2018 CONFERENCE
Vancouver, BC

June 2018

Aide-Mémoire

On June 12 2018, J.W. McConnell Family Foundation's RECODE initiative and CAUBO co-hosted two back-to-back workshops on the Social Purpose Administration and Finance Framework at CAUBO's annual conference. The purpose of the workshops was to provide an overview of the framework and engage finance and administration professionals on opportunities and challenges to advance social impact in their functions and mandates. This is a summary of the discussion.

Key Findings

- Considerable work is already underway, there are many good practices to be shared
- Social purpose admin and finance requires a senior champion to be successful
- It needs to be included in the strategic plan for it to become an institutional priority

Introduction

Over 170 participants attended two CAUBO workshops on Social Purpose Administration and Finance. Chad Lubelsky, McConnell Program Director, and Coro Strandberg, Social Purpose Administration and Finance Advisor, provided an overview of the initiative. Martin Porchuko, VP Finance and Administration at SFU, and Denyse Rémillard, VP Administration and Sustainable Development at Université de Sherbrooke, shared an update on their respective efforts to integrate social and environmental innovation into their departments, and encouraged others to consider how to accelerate and scale their own impacts within their mandates and functions. The rest of the workshop time was spent in both small and large group discussions on current and future efforts, challenges and collaboration opportunities.

Discussion Summary

1. These are the notes from the small group discussions:

What social purpose admin and finance initiatives are you or others working on now or in the future?

Examples from the discussion include:

- Social and sustainable procurement initiatives
- Social hiring including diversity in our unit and hiring people with disabilities
- Innovation hubs and parks
- Community kitchens
- LEED, wood-first and passive house building innovations
- Healthy living centre
- Legal and dental clinics
- IT services for the city
- Alternative transit
- Pedestrianization of campus
- Solar installations

What are barriers and challenges to embedment in functions?

These are the main barriers identified:

- Perception (including limiting self-perception and external stakeholder perceptions)
- Budget
- Time
- Priorities and focus on day-to-day activities
- Transient student population
- Buy-in
- Collective agreements
- Liabilities

2. These are the notes from the large group discussions:

- There are lots of great things being done by admin and finance professionals, but mostly organic, sporadic activities, one-off projects without roots and projects that are opportunistic and ad hoc
- There is a need for visionary leadership; social innovation in finance and administration works where there is a champion, but this is rarely part of the institution's strategic or operational plan, for example: there is a small mention in our strategic plan, but we have to lean very heavily on one point to make the case for this sort of thing; commitment exists at the institutional level, but it is not embedded in operational plans
- Challenges include:
  - Scarcity of time and resources; how do you fit this in?
  - Communication and story telling is lacking, limiting people's ability to piggyback on initiatives, both across institutions and within institutions; there is a need for knowledge sharing and mobilization; we need to surface these stories to structure our reality; who is telling the stories and from what platform counts
  - Limiting perception issues:

- Self-perception: we tend to believe this is not in our wheelhouse; while we could support and cheerlead it, we should not initiate it; however, once this is tapped and engaged, it changes the way our people feel about their work
- Stakeholder perception: our external stakeholders may not believe this is an appropriate role, based on their past assumptions and experience. They need to support our social impact pivot. For example, we are building in our hollowed-out downtown, and are being accused of diverting attention from our mandate as we are not a downtown developer

Opportunities for Collaboration

In the second workshop, participants were polled for their ideas on priority areas of collaboration, the details of which are included in the Appendix. These are the top priorities identified by participants:

- **Best Practices, How-To and Case Studies:** Identify and share sector best practices in social purpose admin and finance for replication and scaling
- **Integration in Operational / Strategic Plans:** Identify and share sector examples where social purpose admin and finance have successfully been embedded/incorporated into operational or strategic plans
- **Training and Professional Development:** Provide support and resources to help Admin and Finance VPs & Leaders introduce social purpose admin and finance ideas to their teams
- **External Partnership and Collaboration:** Develop tools, resources and case studies of finance and admin engaging external stakeholders (e.g. public, private & community sectors) in social purpose admin and finance projects

Over 60 people signed up to be kept informed and engaged on the initiative, from across 24 universities. See the appendix for a list of participating universities.

Next Steps

In response to this feedback, CAUBO and McConnell are pursuing a three-track approach:

1) Strategic Plans: Hosting two separate exploratory conference calls with University Presidents and Vice-Presidents Finance and Administration for the purposes of understanding the opportunities and challenges of creating a more explicit mandate for social purpose administration and finance within strategic plans
2) Professional Development: Hosting a webinar series on social purpose administration and finance best and emerging practices and offering introductory social purpose workshops to finance and administration departments
3) Best Practices: Updating the Best and Emerging Practices Inventory with new initiatives identified in the Spring Survey

Contact Us

If you would like to join the mailing list or have questions, feedback or comments on this initiative, please contact: Chad Lubelsky, McConnell Program Director, at: clubelsky@mcconnellfoundation.ca.

Appendix: Polling Results

These are the results of the polling conducted to identify opportunities for collaboration to scale and accelerate social purpose in administration and finance in higher education.

Question 1: Which of these initiatives would help you / your function / your department embed, accelerate and scale social purpose and impact? Choose all that apply.

Best practices	41% (18)
Benchmark	20% (9)
Quick start ideas	18% (8)
Checklists	16% (7)
Help desk	2% (1)
None	2% (1)

Question 2: Which of these initiatives would help you / your function / your department embed, accelerate and scale social purpose and impact? Choose all that apply.

Plans	45% (14)
Values	29% (9)
Governance	23% (7)
None	3% (1)

Question 3: Which of these initiatives would help you / your function / your department to embed, accelerate and scale social purpose and impact? Choose all that apply.

Training	29% (12)
Team engagement	27% (11)
Existing networks	20% (8)
Peer networks	17% (7)
None	7% (3)

Question 4: Which of these initiatives would help you / your function / your department embed, accelerate and scale social purpose and impact? Choose all that apply.

External	(19)
Research	(12)
Students	(11)
Government	(11)

Appendix: Participating Universities

Participants that signed up to be kept informed are from the following institutions:

- University of Toronto
- Université du Québec à Montréal
- York University
- Simon Fraser University
- McGill
- Mount Royal University
- University of Ontario Institute of Technology
- Concordia
- University of Sherbrooke
- University of Alberta
- University of British Columbia
- Memorial University
- Sainte-Anne University
- University of the Fraser Valley
- University of Saskatchewan
- University of New Brunswick
- University of Manitoba
- Queen's University
- University of Guelph
- Dalhousie University
- Lakeland College
- Mount Allison University
- Brandon University
- University of Victoria