Social Purpose Administration Primer

Using Financial and Physical Instruments to Build Social Infrastructure

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McConnell | RECODE

Preamble: Social Purpose Administration

How can higher education finance and administration leaders contribute to their institution's social ambition?

RECODE is championing a national initiative to support post-secondary institutions across Canada in exploring emerging trends and expectations in social purpose administration.

This initiative stems from broader research RECODE and Simon Fraser University pioneered last year on the roles post-secondary institutions can play to enhance community well-being – including and beyond their primary mandates of teaching and research. This concept – known as social infrastructure – is described in their report, Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Communities, which lists the capacities and assets of universities, colleges and polytechnic institutes that can be mobilized to meet community needs.

RECODE seeks to identify industry best practices and support administrators in learning about embedding greater social value in domains such as human resources, facilities management, procurement, investment, risk management, planning and budgeting and ancillary services.

While many administrative officers are already familiar with social and sustainable procurement and social and sustainable investment, the aim is that eventually all core administrative functions will have a more explicit social component.

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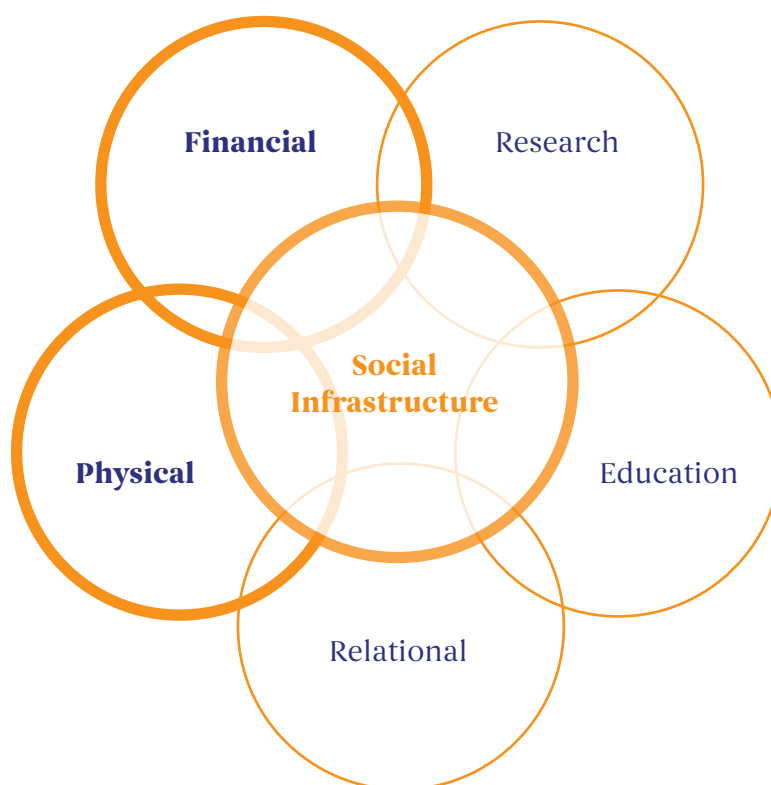
The instruments listed below are introduced and explained in the social infrastructure report. The remainder of this report addresses the two dimensions which are in the mandate of Finance and Administration Departments: Financial and Physical Instruments.

Financial
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- Commercialization role
- Risk management skills and expertise
- Budget and capital planning

Physical
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Relational
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Education
- Teaching mandate
- Faculty expertise
- Student expertise
- Social services

Financial and Physical Instruments List

The following describes the fifteen financial and physical instruments identified in the Social Purpose Administration Project to date. This will be updated as new instruments are identified and new descriptions are proposed.

Type	*Instrument and Description*
Financial	

1. Procurement: Including social and environmental factors in the procurement process, such as buying local, sourcing from social enterprise suppliers, sourcing from youth-owned businesses, collaborating with suppliers on social or environmental issues, trialing and helping to commercialize social or environmental business innovations, sourcing from suppliers committed to hiring youth, etc.

2. Investment: Including social and environmental factors in pension and endowment fund investments, such as investing for positive social and environmental impact, divesting assets that don't align with the institution's mission or that create future investment risks, and engaging companies in the investment portfolio to better manage their social and environmental risks and impacts.

3. Administration hiring: Recruiting, training and hiring people with employment barriers into administrative staff roles, such as new Canadians, Aboriginal people, long-term unemployed, people with disabilities, etc.

4. Compensation: Ensuring that staff and service contractors are paid a living wage. (A living wage is an hourly wage that enables employees and their families to meet basic needs such as food, clothing, shelter, transportation and childcare. It sets a higher test than the legal minimum wage, reflecting what earners in a family need to earn based on the actual costs of living in a specific community.)

5. Real estate: Incorporating social and environmental goals into property development, such as intentionally revitalizing depleted urban areas, prioritizing local procurement and local jobs, promoting apprenticeships and skills training for designated groups (at-risk youth, long-term unemployed, women, etc.), including community services such as child care, adopting innovative green and circular (zero waste) building development practices, etc.

6. Funding sources: Helping community initiatives access new sources of funding by leveraging the institution's charitable tax status for community projects, tapping into third-party funding sources (e.g. donors to the institution), etc.

Type	Instrument and Description

Type   **Instrument and Description**

Financial
(continued)

7. **Communications budget:** Using the institution's marketing channels and communications budget to advance public education and awareness and shared community objectives.

8. **Commercialization role:** Embedding community and social objectives in the institution's commercialization mandate, so that new business and commercial ventures generate positive benefits or at least zero harms to community and society.

9. **Risk management skills and expertise:** Leveraging academic knowledge, integrate social and environmental considerations into the institution's approach to enterprise risk management and share insights, findings and scenario analyses with civil society and industry.

10. **Budget and capital planning:** Identifying opportunities to innovate value-add social / community measures and outcomes from budget and capital investments to create additional community benefits.

Physical

11. **Facilities:** Designing and opening up access to institutional buildings for community use (this includes, but goes beyond, gyms, rinks and meeting rooms).

12. **Cultural services:** Enhancing the relevance of and promoting the institution's cultural amenities (e.g. entertainment, athletic offerings, library services, learning events, religious spaces, etc.) to the community.

13. **Temporarily vacant student housing:** Designing community programs and services that use student housing that is routinely vacant at periods throughout the year.

14. **Technology:** Enabling community partners to access and use technology and internet resources.

15. **Land:** Enabling community access to land and agricultural services, for community gardens, greenhouses, etc.

16. **Ancillary services:** Embedding social and environmental considerations in food services, meetings, conferences and events, bookstores, parking, security, and other ancillary services.

Financial and Physical Instruments Sample Practices
Version 1.0 (February 2018)

The following is a list of sample initiatives across Canada, the US, and Europe focused on mobilizing financial and physical assets and capacities to create institutional and societal value. (Note: Some are compiled from online sources, which are linked. Others are summarized from direct communications with the institution and thus no references are provided.)

Financial

Instrument	Sample Initiatives
1. Procurement	**Vancouver Community College** The grounds and gardens at Vancouver Community College are maintained by Mission Possible, a maintenance company that employs inner-city residents and assists those with employment barriers to reach their full potential. **Carleton University** Carleton includes social enterprises in its centralized online procurement hub, "eShop", through which campus buyers order goods and services. Here is one example: "Sweet Memories Baskets and Favours is an Ottawa-based Social Value Enterprise that offers baskets of goodies, while providing employment opportunities for individuals with disabilities. If you are looking for speaker gifts or gifts for a special occasion, take a look at their catalogue in the New and Noteworthy section of eShop and see what they have to offer. Note: All purchases of gifts must comply with the Payments to Individual Policy." Source.
2. Investment	**Simon Fraser University and University of Ottawa** In 2016, SFU and UOttawa adopted goals to reduce the carbon footprint of their investment portfolios by at least 30 percent by 2030 – in line with Canada's national climate commitment. Source and Source. **University of British Columbia** $265 million of UBC's consolidated working capital and endowment fund is invested in social housing and $117 million is invested in climate change greenhouse gas emission reduction projects. Source p. 14.

Financial

Instrument	Sample Initiatives

2. Investment (continued)

University of Cincinnati

Since the early 2000s, the University of Cincinnati has allocated over 10 percent of its endowment (of over $1 billion) to local investments to stabilize and revitalize the city's Uptown District. The University has experienced a nearly three-to-one leveraging on its endowment money through tax debt, loans from banks and other sources. Source.

Northeastern University

Northeastern launched a loan program for women and minority-owned businesses in 2016. The initiative, called the Impact Lending program, will enable local small-business owners to secure loans, at below-market interest rates, to expand their businesses. Northeastern has committed $2.5 million in seed funding to the program, which will allow for a revolving fund of $6.5 million in loans. The university has partnered with Local Initiatives Support Corporation, a non-profit that provides loans and advisory services to underserved small businesses. LISC will administer and oversee the loans, ranging from $1,000 to $1 million, with Northeastern's seed funding serving as a guarantee. The loans can be used for a variety of business needs, including hiring new staff, obtaining new equipment and facilities and purchasing inventory. The goal of the program is to serve 85 small businesses and create 330 jobs in the first two years. In addition to helping businesses grow, the program will also allow for these businesses to compete for larger contracts with the university. According to the university president: "An entrepreneurial ecosystem must embrace innovation and support those who are one opportunity away from turning ideas and hard work into prosperity. It is part of Northeastern's ethos to invest in innovation and celebrate the entrepreneurial spirit both within our own community and through our partnerships with the communities around us."

In 2016, the university also committed to direct $25 million of its endowment to investments with a focus on sustainability, including clean energy, renewables, green building and sustainable water and agriculture. Source and Source.

Financial

Instrument	Sample Initiatives
3. Administration hiring	**University of Victoria** UVic has an Employment Equity Plan 2015–2020 with a goal to improve the participation of members of designated groups in all jobs and at all levels where they are under-represented, and achieve and retain a workforce representative of the appropriate community. Designated groups include Indigenous Peoples, Members of Visible Minorities and Persons with Disabilities. Source.
4. Compensation	**University of Glasgow** University of Glasgow has been accredited as a living wage employer as of 2015. Source.
5. Real estate	**Arizona State University** ASU and the City of Phoenix partnered in an investment to locate university facilities in the city's downtown core. The university moved its schools of nursing, journalism and public programs downtown from its main campus outside the city. ASU now has 1,000 faculty and staff and 6,000 students in a once-blighted area of Phoenix, with plans to enroll two-and-a-half times as many there by 2020, and to connect the campuses with a light-railway line. The development includes student housing. Source. **University of Toronto** University of Toronto Scarborough partners with Hammer Heads for on-campus construction projects. Hammer Heads is a skill and employment-based training program offering apprenticeship career opportunities for "at-risk youth". Recent construction projects involving the program include the Environmental Science and Chemistry building and Highland Hall, the new home for Social Sciences, and the Registrar's Office. Source.

Financial

Instrument	Sample Initiatives

6. Funding Sources

Kwantlen Polytechnic University

Funds from KPU Co-op and KPU Faculty of Arts are being used to support SurreyCares Community Foundation in hiring a Co-op student from Criminology to research the Community Foundations of Canada Vital Signs Report. SurreyCares Community Foundation is heading up a Vital Signs report on Surrey's Aboriginal population and involves a wide range of stakeholders.

Ryerson University

Ryerson University responded to the Syrian refugee crisis by raising $4.9M and mobilizing over 1,000 volunteers, including students, to sponsor 437 Syrian refugees. The "Ryerson University Lifeline Syria Challenge", grew to involve all four Toronto area universities supporting 90 sponsorship groups. Key to the success was the role of Ryerson's finance and administration departments. Units managed refugee sponsorships as applied research / experiential learning initiatives; administered complex financial reporting and reimbursement processes; and managed donations and charitable tax receipts in support of the university's charitable objects. Given the university had never undertaken an initiative like this before, technology systems and administrative processes required significant adaptation and support from staff beyond regular activities. Source.

Physical

Instrument   **Sample Initiatives**

10. Facilities   **Arizona State University**

Arizona State's Sandra Day O'Connor College of Law opened a new downtown Phoenix campus in 2016 to showcase a new way for the legal community and public to connect. The six-storey, 280,000-square-foot facility is wrapped around a central core that's open to the public. The building creates a massive atrium and living room that invites dialogue, interaction and collaboration, including space for a number of community law firms, think tanks and non-profits. It was designed to be one of the most permeable, open and accessible university buildings ever built. A great hall, filled with expansive open seating, is considered the "legal living room" and features a transformable layout that can be turned into an auditorium and even a public courtroom.

Just 70 percent of the building's space is taken up by the law school; other tenants include the McCain Institute for International Leadership, the Sandra Day O'Connor Institute and the ASU Alumni Law Group, a non-profit educational law firm. Having think tanks and community clinics share space with students will give them new opportunities for cross-discipline learning and engagement with real-world issues and the everyday practice of law (a think tank in the building is already examining issues surrounding the Zika virus and the legality of quarantines). Source.

Concordia University

Temps Libre is a co-working collective space with a key mandate to provide a free public space for the community at large. Concordia is a founding member of Temps Libre, a new co-working space located in the Mile End. Its 88 seats will be populated by social entrepreneurs, artists, NGOs and community members, plus there is free space for public lectures, exhibitions and workshops. Within Temps Libre, Concordia has a cluster of eight desks dedicated to faculty and students interested in developing new collaborations and connections with the community and discovering alternate modes of teaching. As part of the university's partnership agreement, Concordia researchers and graduate students have access to a corner of the co-working section of the space. Services for co-workers include a large meeting room for classes or workshops, as well as access to the public area, with comfortable seating, Wi-Fi, a library and an arcade.

Physical

Instrument	Sample Initiatives

12. Temporarily Vacant Student Housing

King's University College

In the 2015-16 school year, the Dean of Students who has responsibility for Residence Services, in partnership with the King's Campus Ministry, supported the university's refugee resettlement efforts. Temporarily vacant student housing was offered for free to a Syrian refugee family who stayed one year and then moved on to independent housing. The following school year (2016-17) as the university had surplus residence space, two refugee students were provided subsidized housing and meal plans for a year. This effort to leverage the surplus space for "social good" is part of the institution's broader community-building commitment.

13. Technology

University of Alberta

The City of Edmonton and University of Alberta partnered to make wifi available in the Light Rail Transit system.

Simon Fraser University

In 2017 SFU Surrey's IT department donated 161 desktops and 11 laptops to 11 community non-profit agencies. IT staff personally delivered the equipment and provided some technical support to get the computers operational at each agency.

14. Land

Ryerson University

The university has a quarter acre rooftop farm on the Andrew and Valerie Pringle Environmental Green Roof, located on the George Vari Engineering Building. Originally built in 2004 as part of the original infrastructure of the building to catch storm water runoff, a pilot project in 2013 launched to determine if it was possible to successfully grow food. Due to the success of the project, in 2014 the entire green roof converted into a small-scale farm/market garden. In 2015, the Ryerson Urban Farm completed the conversion of the 10,000 square foot rooftop, producing 7910 pounds with a revenue of $18,634.00.

Physical

Instrument	Sample Initiatives
15. Ancillary Services	**Simon Fraser University**

Simon Fraser University

At the SFU-hosted C2UExpo conference in May 2017, 65 individuals facing barriers to employment were hired and trained as "Community Ambassadors". They performed event management roles including volunteer coordination, greeting, conference witnessing, logistical support, media, communication, documentation, facilitation and waste education. The Community Ambassadors were identified in partnership with approximately 25 non-profit agencies in Vancouver, Burnaby and Surrey. Each Ambassador was expected to commit to a minimum of 10 working hours during the conference. They gained work experience, built employability skills, met new people, obtained references, and were an integral part of this international conference.

Concordia University

When a new contract with a campus food service provider began in 2015, the university established targets for local and sustainable food purchases, including 75% local produce in summer months, 100% Canadian beef year-round and 90% Fairtrade-certified coffee and tea. In addition to working with the contractor, the university collaborates with on-campus student initiatives and student-run food services to identify local and sustainable purchasing opportunities. A Sustainable Food System Coordinator tracks local and sustainable food spending and helps identify new suppliers. Now, Concordia's residence dining halls have over 70 recipes in rotation that are made up of 50 percent or more locally-sourced ingredients, including soups, salads, mains and side dishes. The university hopes to expand the program to its retail outlets. Source and Source.

Physical

Instrument	Sample Initiatives
15. Ancillary Services (continued)	**University of Winnipeg** In 2009 the University of Winnipeg created its own arms-length food services company called Diversity Food Services — a joint venture of UW's Community Renewable Corporation and SEED Winnipeg Inc., a local non-profit focused on employment and economic development. One of Diversity's specific social objectives is to provide job opportunities in the food industry for new Canadians, Aboriginal people, community residents and university students and those who are "hard-to-employ". Today, Diversity Food Services has 80 staff made up of new immigrants and inner-city residents and runs two cafeterias and a coffee shop on campus, along with a fine-dining restaurant and a catering branch that services high-profile events in the city. Source and Source.