

Social Purpose Administration and Finance Orientation Workshop Package

▶ INTRODUCTION

Hello! Thank you for joining us on the Social Purpose Administration and Finance Journey!

This is an orientation workshop package designed for VPs of Administration and Finance and their teams (especially their direct reports) to understand the emerging concept of social purpose administration and finance. It provides information and material to hold a workshop that combines professional development with strategy-action.

This background paper provides an overview and set of instructions for successfully designing and implementing a 1.5 hour introduction to social purpose administration and finance.

▶ BENEFITS OF THE WORKSHOP

- Help staff keep abreast of trends and developments in the profession and post-secondary sector
- Position leadership as experts and enablers of this idea in your institution
- Learn new strategies to future-proof your organization
- Help staff anticipate and get ahead of stakeholder expectations
- Build pride and self-confidence for your early practices and identify future practices to go beyond
- Provide coordinated approach to the topic, rather than random, piecemeal and ad hoc measures

- Provide a common language and align the department on the concept
- Professional development opportunity for staff

“As the Vice President Finance and Administration at SFU, my team and I participated in a one hour workshop on social purpose finance and administration. I found the conversation to be valuable on many fronts – thought provoking, idea generating and even re-assuring in that we were already starting down a path of social innovation without realizing that was what we were doing.

*“As a senior leader I have always viewed myself as a progressive thinker. Traditionally the role of VP Finance and Administration was “Finance” and now more currently our institutions expect us also to be service oriented in the support the academic mission. **I believe the next phase of expectations are rapidly approaching senior administrators – helping enable the University to live and fulfill its social mandate.** It’s becoming an ever growing expectation of our staff, students, faculty and communities and the challenge is being put to us. In this regard I think you will find the workshop to be a timely and thought provoking investment of your time.”*

- **Martin Pochurko, Vice-President Finance and Administration, Simon Fraser University**

► CONNECT WITH US

We would love to hear about your efforts to deliver this workshop. Contact **Chad Lubelsky** at **clubelsky@mccconnellfoundation.ca** if you have questions or need assistance tailoring it to your institution.

Let’s get started! The rest of this document and accompanying materials provide all the background you will need for a successful 1.5 hours of innovation and activation.

► SFU HOLDS ORIENTATION WORKSHOP WITH KEY STAFF TO ALIGN THE DEPARTMENT

In 2018, the VP Finance and Administration at SFU included a one-hour introduction session on social purpose administration and finance within his regular meeting of direct reports. The purpose of the session was to increase awareness of the Social Purpose Administration and Finance Framework among administrative leaders, to share current practices at SFU, and to consider new ways to advance social impact in admin, finance and operations using the Framework.

Participants included senior leaders in finance, human resources, safety, sustainability, facilities, strategy, procurement, information and commercial services and external relations. The session concluded that there are many strong practices in place, driven by the culture and individual passions, although a strategic intent is not yet defined. Leaders were beginning to collaborate externally with peers and there were untapped opportunities to collaborate with external stakeholders on shared projects, in which costs could also be shared. Engaging more with expert academic researchers and the student body are future opportunities. There are challenges with time, resources and entrenched systems, however this is not insurmountable as progress is happening.

► KIT OVERVIEW

This Kit includes:

- Overview of Workshop (this document)
- Pre-reading materials (this document)
- List of suppliers (this document)
- Workshop Slides
- Workshop Handout
- Facilitator's Agenda

▶ PURPOSE OF THE SOCIAL PURPOSE FINANCE AND ADMINISTRATION ORIENTATION WORKSHOP

The purpose of the workshop is to increase the understanding of functional leaders regarding the opportunities and benefits of applying a social innovation / impact lens to existing and future priorities and projects. The overall ambition is for functional leads who experience the workshop to become interested and engaged in activating increased social impact within their operational portfolios, for greater benefits to students, the institution and society.

▶ OUTLINE OF THE WORKSHOP

The workshop will provide an overview of the CAUBO-RECODE initiative to engage admin and finance functions on social purpose / innovation and engage the different functions in exploring how this concept applies to their role, including past, present and future opportunities. The opportunity is that by applying social purpose to the different functions, new thinking can be tapped and explored for the university's operations. As a result of the workshop, all functional leaders should understand the opportunity and potential of realizing social outcomes from traditional administration functions.

▶ PRE-READING INSTRUCTIONS FOR PARTICIPANTS

Please read the following materials in advance. This will take one hour.

- **Project Description**
- **Background Paper**
- **Social Purpose Admin and Finance Primer**

▶ SUPPLIES

You will want to have the following supplies available:

- Flip chart and markers for facilitator to take notes and record discussion
- AV for powerpoint presentation

▶ RECORD OF MEETING

Appoint a recorder for the meeting who will summarize the outcomes and next steps.

▶ ABOUT US

The J.W. McConnell Family Foundation is a pan-Canadian foundation that works toward building a society that is inclusive, reconciled, sustainable and resilient. RECODE, an initiative of the McConnell Foundation, is a call to 21st century post-secondary education that enhances community wellbeing. As a funder, capacity builder and convener, RECODE supports the capacity of institutions to weave social innovation tools and practices into the very fabric of campus and community culture.

The Social Purpose Administration and Finance project is a collaboration between McConnell and CAUBO to engage administration and finance professionals in accelerating and scaling their social impact contributions for the betterment of students, society and their institutions.