



A Milestone Report & Three Year Retrospective Review

Maximizing Social Impact in Canadian Post-Secondary

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McConnell

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Acknowledgements

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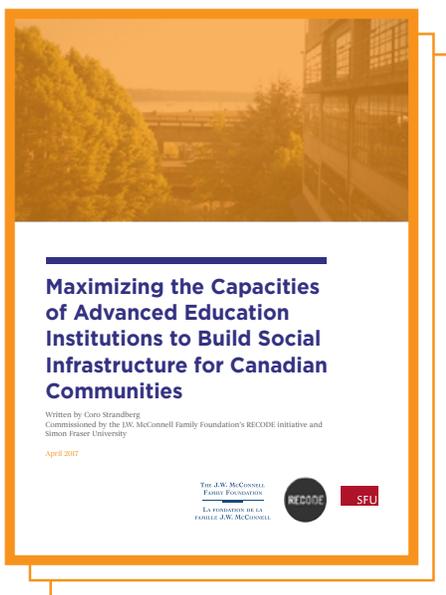
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Executive Summary

In Canada and around the world, society faces challenges and uncertainties that threaten social cohesion and community well-being. Advanced education institutions are uniquely positioned to invent and scale the solutions needed to enable a better quality of life for all of society within planetary thresholds. Many of these solutions can be found in their existing assets and capacities, which, when directed at building social infrastructure, can reveal the pathway for citizens and their institutions to thrive.



In 2017, these words launched a **journey to understand and mobilize the capacities universities, colleges and polytechnic institutes can unlock and maximize individually and collectively to help build social infrastructure for Canadian communities.**

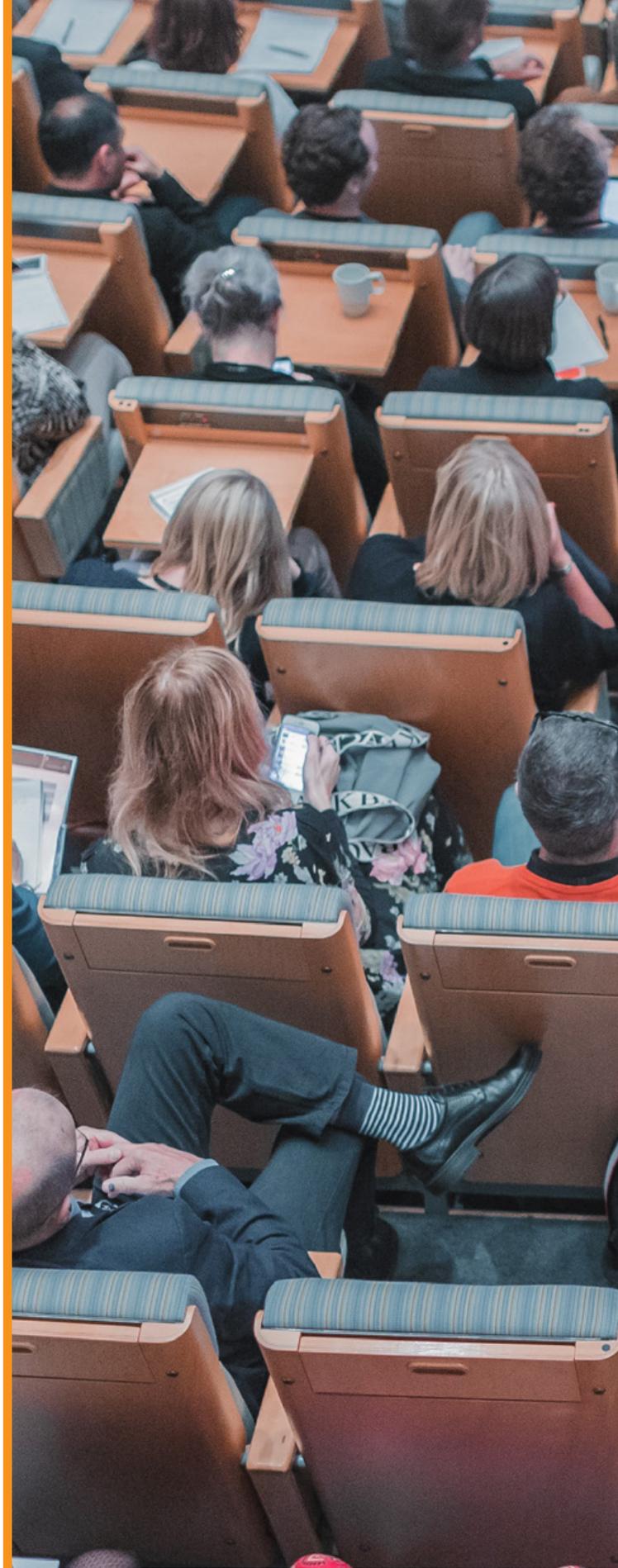
Since then several collaborations have begun within the post-secondary sector to further unlock institutional assets to accelerate and scale the social impact of higher education. This paper, a milestone report and three-year retrospective review of the White Paper **“Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Communities”**, chronicles those developments and sheds lights on the journey ahead.

A few observations can be made from the visions, objectives and activities of these initiatives arising from the White Paper’s Call to Action. First, post-secondary institutions have been engaged in social innovation and social impact efforts for a long time. The White Paper gave voice to those undertakings and stimulated a collective response across institutions to deepen their impact through sector collaborations.

Second, the White Paper sparked social impact initiatives within three associations: Universities Canada, Colleges and Institutes Canada and the Canadian Association of University Business Officers. It also catalyzed three multi-institutional cohort collaborations to advance strategies that would embed social impact further into institutional life. And in at least one known instance, its tools became the framework for a university to catalogue and frame its social impact narrative.

The projects reveal a desire across the sector (about 85 – 90 per cent of institutions are participating) to learn from each other and to collectively explore, test and scale higher impact strategies. All initiatives are considering or have adopted a community of practice model, bringing institutions together to share and grow. Two threads in the social infrastructure fabric are observable: a belief in the imperative of systems change, and recognition that building social infrastructure into an institution’s strategy and operations is an exercise in systems change. Collectively, these initiatives are harnessing the passion, expertise and influence of leaders to foster social impact capacity and field-building within the sector. With engaged associations such as Universities Canada, Colleges and Institutes Canada and the Canadian Association for University Business Officers (CAUBO), it is possible to imagine that social impact will become an even more mainstreamed practice of post-secondary institutions in the future. The profiled Carnegie Community Engagement Classification System and the Ashoka Changemaker Campus Designation will further this effort.

While the COVID-19 pandemic is having a profound effect on students, institutions, and their ecosystems, it is also a time for renewal and rebuilding. Accelerated by the White Paper, the post-secondary sector has a stronger social impact platform for collaboration and engagement across and within institutions. The initiatives described in this commemorative report are poised to help higher education institutions - through their associations and via the social infrastructure collaborations built over the past three years - play an even stronger role in realizing a flourishing future.





The Social Impact Pathway

The seven initiatives described in this paper reveal a pathway of sorts, that associations are implicitly following to embed and scale social impact among their members. **This “pathway” comprises twelve roles, illustrated below for the benefit of others within advanced education.** The more that associations embrace these measures, the greater the likelihood that post-secondary institutions will be able to unlock more of their assets for the greater good.

The roles outlined in the Social Impact Pathway can be used and adapted by associations and sector partners to build post-secondary education (PSE) “social impact capacity” and create a PSE “social impact field of practice”. This schematic can also be used to identify next steps in the journey, accelerating further progress towards a thriving future.



Key Takeaways



- White Paper on **“Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Communities”** sparked sector-wide collaborations.
- There is a pent-up desire to learn from each other and share best practices in social impact activation.
- Some initiatives launched in response to the White Paper’s call to action are housed in associations and others are stewarded by coalitions of institutional leaders.
- White Paper tapped into a desire for greater social impact and sparked a range of experiments and pilot projects to mobilize institutional assets for social change.
- Collectively, the initiatives are accelerating a “social impact field of practice”, expanding upon the mission of higher education beyond teaching and research to formally and explicitly contribute to a sustainable future for all.



Foreword

There is a danger at a time of crisis that, in seeking to overcome immediate threats to our safety and security, we might look inward and disengage. We live in such a moment. Amidst the COVID-19 pandemic, advanced education leaders struggling to maintain core functions might be tempted to turn down opportunities to extend their institutions' capacities.

Yet the work begun three years ago by the McConnell Foundation and Simon Fraser University, and taken up with such energy by Universities Canada, CICan, CAUBO and others, has demonstrated how and why building social infrastructure for Canadian communities can, itself, be seen as a core function for our sector. And this time of crisis has confirmed more than I could ever have imagined the value and importance of our institutions expanding their community-building efforts.

Consider the contributions: of our educators, enlarging public knowledge of this coronavirus and its consequences; of our researchers, seeking solutions to a multitude of COVID-19-related problems; of our institutions, providing equipment, supplies and facilities. Consider the efforts of our students, faculty and staff, creating programs and support networks to assist those suffering in social isolation.

Three years ago, we undertook a two-part exercise. First, we considered a taxonomy of all the instruments that advanced education institutions might use to strengthen Canadian society. Second, we challenged ourselves and each other to explore how best to leverage those instruments to enhance societal well-being.

As this survey shows, that exercise gave rise to a national flurry of experimentation and productive community engagement. And far from disrupting our academic mission or diminishing our reputations, we found that broadening our engagement was more likely to augment and enrich that mission, and to increase public support for all our activities.

I am deeply grateful to the McConnell Foundation for helping to launch, and our peers and partners for joining us on, this journey. If COVID-19 has taught us anything, it is how much our communities depend upon us, and how much we depend upon each other. So let us approach the road ahead with renewed purpose and confidence in our shared capacities to serve and nurture a strong society.



Andrew Petter
President and Vice-Chancellor,
Simon Fraser University



Definition of 'Social Infrastructure':

The White Paper defined 'Social Infrastructure' as the organizational arrangements and deliberate investments in society's systems, relationships and structures that enable society to create a resilient, just, equitable and sustainable world. It includes social, economic, environmental and cultural assets.

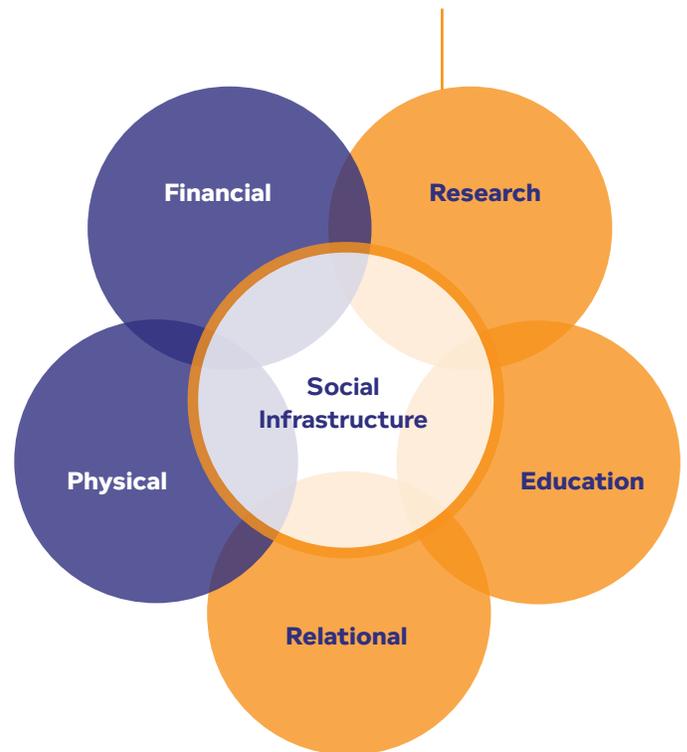
Introduction

This Milestone Report is a summary of initiatives that have been inspired and catalyzed by the influential White Paper **“Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Communities”** commissioned by SFU and the McConnell Foundation and published in May 2017. This report is a retrospective review of the initiatives that resulted from the White Paper and its ideas.

This report summarizes the actions, impacts and lessons learned from the following initiatives:

- 1. Universities Canada:**
Social Impact Initiative
- 2. Colleges and Institutes Canada:**
ImpAct: Colleges and Institutes
Collaborating for Social Impact
- 3. Canadian Association of University Business Officers:**
Social Purpose Administration and Finance
- 4. Social Infrastructure Strategic Planning Guidelines** Presidents Pilot Project
- 5. BC Collaborative for Social Infrastructure**
- 6. Carnegie Foundation Community Engagement Classification:**
Canadian Pilot Cohort
- 7. Ashoka Canada**

The White Paper constituted a **Call to Action for post-secondary institutions to accelerate and scale their beneficial social impact.** The paper’s focusing question was: “What capacities can universities, colleges and polytechnic institutes unlock and maximize individually and collectively to help build social infrastructure for Canadian communities?” It identified a range of assets, or tools or instruments that institutions have at their disposal, as revealed in this flower visual and further documented in the paper.



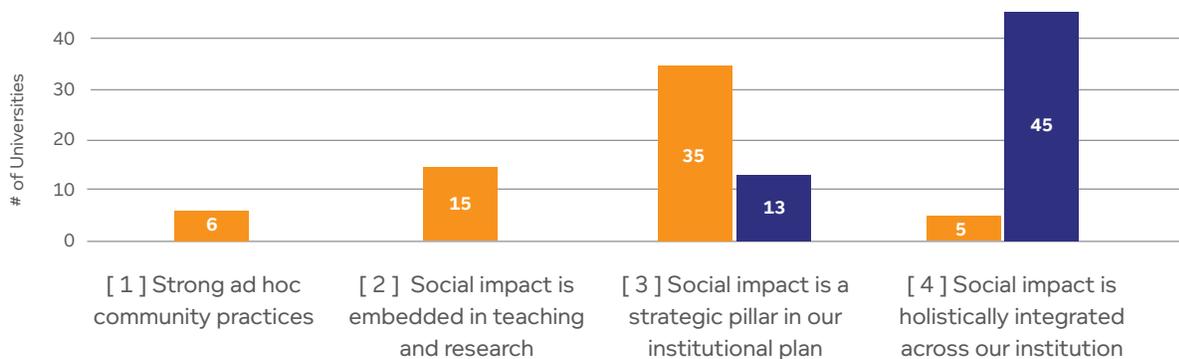
The White Paper also proposed that there was a social impact continuum of practice across institutions as the following diagram sets out.

Continuum of Practices – All institutions are active and engaged in community endeavours. Depending on their priorities, they will be active at different points of the following continuum of community engagement and social infrastructure practices.



In 2019, Universities Canada surveyed its membership to find out where they sat along this continuum and where they desired to be (using the term “social impact”). Two-thirds of its members participated in the survey, totaling 65 universities. As can be seen in the table below, the survey revealed that “universities are strongly interested in advancing social impact practices. Currently, most institutions are at stage 2 or 3 on the continuum. Respondents’ desired states are to either ensure social impact is a strategic pillar in their institutional plan, or integrated holistically across the institution’s governance, relationships and roles.”¹

Social Impact Continuum of Practice: Universities’ current and desired states



The survey results demonstrate the appetite among post-secondary institutions to fully embed social infrastructure. The seven initiatives summarized below further reveal the energy, passion and innovation within the sector to accelerate and scale social impact in their institutions, their communities and beyond. Advanced education institutions are poised to fully harness their capacities, instruments and assets to foster a flourishing future.

¹ – Universities Canada, [Social Impact Survey Results](#) (September 2019, page 5)



McConnell Foundation Role

In 2017, the McConnell Foundation and Simon Fraser University jointly commissioned the **Social Infrastructure White Paper** and co-hosted the first **Building Social Infrastructure Convening** in May 2017 and **Retreat** in July 2017.

Building on the 2017 recommendations, for the past 3 years, as a funder, convenor, capacity builder, strategic learning partner, and field catalyst, McConnell has supported the initiatives described in this Milestone Report.

As we embark on a new decade and pivotal phase of work, McConnell looks forward to continuing to work with allies in the post-secondary sector to build a more inclusive, innovative, sustainable and resilient society.

Accelerating Social Impact

Universities Canada: Social Impact Initiative

Objectives

Over the past decade, university-community collaboration has increasingly been a priority area for Universities Canada. The association worked closely with leaders across university, philanthropic, and municipal sectors to explore ways to overcome key challenges and barriers, strategically advance partnerships for greater impact, and find ways to address critical issues facing Canadian communities. In 2018, Universities Canada received a three-year grant from the McConnell Foundation to amplify this work; more specifically, to lead a pan-Canadian initiative to map, strengthen and promote the social impact of Canadian universities in their local communities.

The main objectives of the Initiative are to develop strategies to maximize and increase the social impact of Canadian universities; to strengthen collaborations between universities and community/ philanthropic organizations; and to inform the public of the role universities play in the development of social infrastructure.

How it Relates to the White Paper

Universities Canada's Social Impact Initiative aligns directly with the objective of the White Paper, which is to maximize the social impact of universities and ensure there are strong relationships and trust between the institutions and their local communities.

Target Audience

The target audience for Universities Canada Social Impact Initiative is the association's members and their institutions.



Universities
Canada.
Universités
Canada.

Achievements to Date

Mapping the Landscape to deepen our understanding of key social impact players, learn from past initiatives, and identify areas of duplication and synergies. Since 2018, Universities Canada convened dozens of meetings with representatives from government, universities, colleges, and philanthropic and community organizations to consider areas of collaboration and understand how Universities Canada's initiative can complement current work. Universities Canada participates in key events in the social engagement sector, thereby establishing itself as a major actor in this ecosystem.

Convening an Advisory Group. Universities Canada selected ten representatives from universities, students, philanthropic sector, and community organizations to feed into the planning, design and implementation of the Initiative. Universities Canada consults with this group on a regular basis via teleconference and in-person meetings to provide advice, give feedback on the overall direction and activities of the initiative, and guide next steps.

Building a pan-Canadian Network of Social Impact Leads and a Community of Practice. Universities Canada asked its membership of 96 university presidents to identify a social impact lead for their institution. To date, more than 82 universities have put forward a representative. This network is the basis of a community of practice that will help facilitate knowledge exchange, strengthen relationships, and build capacity amongst our members.



Social Impact Survey. Universities Canada conducted a **social impact survey** to gather information on institutional social impact activities, successes, scalable practices, and existing partnerships. The survey was launched in March 2019. Results provide an overview of institutional social engagement strategies, and of the kinds of initiatives that have been put in place.

Publication of a Webpage on the Universities Canada site. This page promotes the work universities do using videos and articles. It features publications produced by the Initiative and links to other Canadian initiatives of the same type.

Roundtable Discussions. Universities Canada convened over 150 social impact leads and their partners from academia and civil society at **11 regional roundtables** (Vancouver, Victoria, Edmonton, Calgary, Saskatoon, Toronto, Waterloo, Montreal, Quebec City, Sackville and Halifax). The goals were to identify the success factors and obstacles encountered in social impact initiatives, to gather examples of successful initiatives, to facilitate opportunities for university and community practitioners to connect and to determine ways in which Universities Canada can support and encourage its member institutions' mission of social impact and engagement.



Lessons Learned

Intersection and Terminology

The consultations we have engaged in over the past year have shown us that despite the use of widely varying terminology, participants in these consultations are all working with a similar mindset aimed at improving social conditions in the communities where they work. They use the terms: social engagement, social impact, social innovation, social economy, sustainable development, or university/community collaboration. All of these words reflect an effort aimed at advancing initiatives with a positive impact for the environment and communities, and leading to a broader form of social justice.

The diversity of the terms in use is also indicative of the intersection at which the concept of social impact itself is located. Issues of reconciliation with Indigenous peoples and questions about equity, diversity and inclusion, and mental health, as well as the UN Sustainable Development Goals (SDGs), are all issues that invariably found their way in our consultations. The position of social impact at this conceptual intersection is both its most powerful aspect and its most complex. While it is tempting to try drawing lines to delineate the territory and the issues falling under this term, we leave it to our members to define the scope that works best for them.

Anchored in the Long-Term

It will take years to achieve real systemic change at academic institutions. This is a relatively new field of action that is still looking for solid frames of reference. To mention just a few examples, systemic change will require new promotion mechanisms for professors, clear strategic orientations that prioritize social engagement, points of contact at institutions to establish contact among individuals both within and outside of universities, and research funds that support social impact initiatives and partnered research. **Beyond the hundred or so examples that we have catalogued of projects with social impacts, it is imperative to make the social mission of universities an identity that intersects with their research and educational mission.** Universities Canada is in an ideal position to promote this work.

Measurement Frameworks

In the initial objectives for this project, we envisioned that we would measure universities' social impacts and provide measurement frameworks. This is clearly one of the most complex aspects of this project. Quantifying the value associated with social impact activities is a major challenge for the institutions involved. There is no measurement framework comprehensive enough to estimate the impacts that may result from initiatives or from a university's presence in a community. This is a complex problem to which we have been unable to find a solution.

The pilot project of the Carnegie Elective Community Engagement Classification, currently underway at 12 institutions, described on page 38, seeks to develop a means of evaluating and measuring social engagement and impact. The conclusions of this pilot project will not be available until the autumn 2020, but we already know that many amendments will be needed to adapt the American model to the Canadian context. We have raised the question of measurement frameworks with a number of leading stakeholders, and the conclusion is always the same: there is no

ideal measurement framework, the main reason being that measuring an output as intangible as social impact is an extremely complex task. We will be exploring this question during our regional workshops and we will continue to research the literature coming from Canada, the United States, Europe and Australia.

Lack of Funding and Rewards

One of the Initiative's goals is to maximize and increase the social impact of Canadian universities, and to achieve this, we need to urge administrators, professors and students to get more involved. The lack of funding, rewards and career advancement connected with social engagement is a recurring problem throughout the country. For example, it takes more time for researchers to conduct participatory and community-based research. They consequently publish less frequently and bring in less research funding, which is detrimental to their professional careers. Researchers who commit to this path do so out of a sense of passion and conviction, but most of them would still like to see the creation of research funds dedicated to "non-traditional" research projects. They also hope to see cultural and structural changes in academic institutions that will allow for career advancement based on a new set of criteria. In addition, the establishment of performance-based funding arrangements in several provinces requires administrations to evaluate and quantify all of the outputs generated by their respective institutions. Social impacts are not easily measurable, which makes funding them more difficult. If social impact initiatives are not supported by financial means, it is difficult for administrations faced with increasingly tight budgets to do more.

2020+ Plans for the Initiative

- Executive heads will have a discussion on social impact at Universities Canada's membership meeting in April 2020. This is an opportunity to reflect on ways to advance social impact at Canadian universities – **reorganized due to COVID-19**
- Participation in key events such as the C2U Conference, The Ashoka U Exchange and The President's Roundtable on Community Engagement – **reorganized due to COVID-19**
- Regional workshops with our Social Innovation Learning (SIL) network to consult with participants on developing principles of social impact and explore questions like: *How can social impact be measured? How can staff and professors be encouraged to participate in social impact initiatives? How can we track the social impact initiatives underway at different academic institutions? How can institutions and the community communicate with one another?*
- Development of principles of social impact. Much like the Principles for Indigenous Education, the principles of social impact will prompt us to establish a common language and promote social impact as a nationwide priority
- Convening further advisory group meetings via video conference and in-person meetings
- Continuing our communication work by adding new testimonials, articles and stories to our web page

Possible Future Orientations

- Launching an advocacy campaign in favour of a research fund focused on social engagement
- Creating an award for social engagement
- Holding an annual conference on universities' social engagement

Rallying behind the Global Goals

ImpAct: Colleges and Institutes Collaborating for Social Impact



Colleges and Institutes Canada (CICan) recognizes that we are living in a critical time, where SDG-aligned, systemic changes can and must be seeded and nurtured in a significant, intergenerational, multi-disciplinary, multisectoral collaborative effort. Acknowledging that the medium and long-term impacts of the pandemic are not clear, CICan leadership has nevertheless initiated a conversation with post-secondary (PSE) stakeholder organisations and is seeking to engage with other sectors to address this historic opportunity to *leave no one behind* and create Better Futures for Peoples and Communities.

CICan is imagining a more aligned, deliberate effort to work together nationally, leveraging what assets we each have, in order to contribute more significantly to the complex and interconnected local and global challenges we face. Vision, leadership and bold action – all talents of the advanced education community – are needed now more than ever, as business as usual is no longer the best option.

We stand by our commitment to collaboration, to keeping the vulnerable at the top of our priorities, and to contributing to Canada’s and the world’s progress on the Sustainable Development Goals.

Objectives

To enhance the ability of the college sector to create and improve social infrastructure by taking new approaches to collaboration, in order to scale the impact of the contributions they are already making through their individual mandates and best practices. CICan’s project focuses on collective effort, given our role as a national association with a value proposition of being a “force multiplier”.



Colleges and Institutes Canada
Collèges et instituts Canada

“ *The project has provided an invaluable opportunity to work collaboratively with colleagues from other post-secondary institutions to develop a sustainable and equitable approach to supporting students. The ability to work on universal challenges through the sharing of best practices and the development of new ones will change the way we deliver post-secondary across Canada for the better.* ”

— **Shauna Moore, Student Success Coach (RISE Program), Durham College, Reducing Barriers to Access Project Working Group**

How it Relates to the White Paper

The release of the White Paper and CICan’s first workshop discussions with author Coro Strandberg and the McConnell Foundation coincided with the launch of CICan’s consultations to renew its five-year Strategic Plan. The White Paper inspired and supported CICan’s reflection on what role the college system can do as a collective to help build social infrastructure in Canada, above and beyond what individual institutions continue to do locally as part of their fundamental mandate. As a result of this parallel journey, CICan has embraced a more holistic vision for our sector, namely *Better Futures for Peoples and Communities*. In particular, we are responding to the key question posed by



the paper, namely “What capacities can colleges and polytechnic institutes unlock and maximize individually and collectively to help build social infrastructure for Canadian communities?”. CICan’s project focuses on *collective* effort, given our role as a national association with a value proposition of being a “force multiplier”. Furthermore, we have taken the United Nations’ Sustainable Development Goals (SDGs) as our framework and guiding star, ensuring that our efforts contribute both to Canada’s and the world’s commitments to eradicate poverty and achieve sustainable development by 2030 world-wide, ensuring that no one is left behind.

Our understanding of our project’s purpose is guided by the definition of social infrastructure as stated in the paper, that “the organizational arrangements and deliberate investments in society’s systems, relationships and structures enable us to create a resilient, just, equitable and sustainable world. It includes social, economic, environmental and cultural assets.”

Finally, given that ultimately our sector’s focus, mandate and *raison d’être* are the students we educate, train, support and mentor, we are intent on placing students “at the heart” of our work as we “consider how students can be engaged in bringing the ideas represented in this discussion paper to life.”

What this means in practice, guided by the idea of “big teaming” is that we have convened, based on expressions of interest and commitments of in-kind capacity, 23 member post-secondary institutions from 6 provinces, into three thematically-grouped project working groups (PWGs) to co-create, pilot test and iterate new and improved approaches to specific social, economic and environmental challenges. The three PWGs are focused on: reducing barriers to access to PSE for vulnerable populations; social entrepreneurship; and campus sustainability. The team members represent a range of skills and bring disparate domain expertise to the effort to find new solutions to their challenge area.

We have further established a new Student and Alumni Advisory Committee (ISAAC) made up of current students and recent graduates of member institutions, nominated either by their institution or by a national body that they represent (CFS, CASA, ENACTUS, SDSN Canada – Youth, FES, WUSC). The inaugural committee is made up of 20 young people representing 8 provinces and 1 territory, to serve for one-year (renewable). ISAAC includes diverse representation from equity seeking groups and is gender balanced. ISAAC is tasked with ensuring that the student voice and perspective is considered and included by the PWGs as well as by CIGan in all ImpAct initiatives. Furthermore, a requirement of each institution participating in a PWG is that they engage local students on their campuses in the effort.

Together, we are committed to intentional and strategic efforts to benefit society by harnessing [our sector's] additional assets, using the SDGs as inspiration and framework, and placing students at the centre.

Target Audience

Stakeholders within the college and institute sector of Canada such as institutional staff, students, community members.

“ Inaugural meetings at the CIGan Impact PWGs in Ottawa was a great opportunity to share best practices, build community and forge a network with fellow institutions across Canada. I left with both more knowledge of SDGs through a Canadian perspective and increased confidence to implement action at my college.

**— Chris Adam, Sustainability Office
Coordinator, Dawson College, Campus
Sustainability Project Working Group**

Achievements to Date

- Robust governance structure in place – directly engaging 20 member institutions
- SDG project underway to assess awareness, increase engagement, catalyze collaboration in order to “put society on a secure footing”
- Project working groups launched, with staff representatives of 23 institutions from BC, AB, SK, MB, ON, QC, NB, NS
- Virtual ImpAct Community of Practice, with 210 self-referred member institution staff, representing 88% of CIGan members (70% represented by 2 or more staff)
- Delivered eight presentations/informational booths on the SDGs and the college sector in BC, SK, ON
- Applied to three funding opportunities to broaden and deepen our work, received one, waiting on one and did not receive one
- Developing an ImpAct Partnerships team as a new core function of CIGan, inspired by the SDGs and guided by our vision of Better Futures for Peoples and Communities and new 5-year strategic plan. Hiring for three full time positions

2020 Plans for the Initiative

Our three PWGs are committed to having pilot-ready initiatives for the 2020-2021 academic year, touching on: reducing barriers to access (leaving no one behind); social entrepreneurship (students gain valuable skills and knowledge, preparing them for an ever-changing 21st-century labour market); and campus sustainability (high impact solutions to discern the route to a sustainable future).

Capturing the momentum of the SDGs, by end of 2020 we will have:

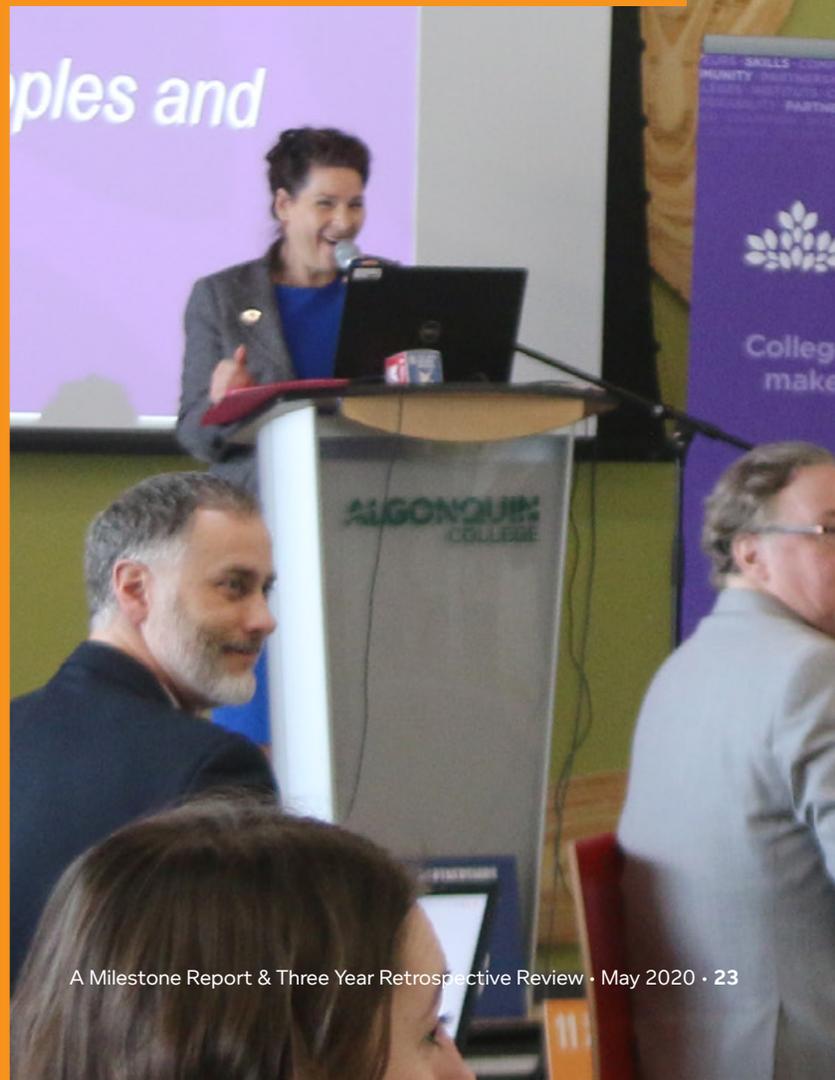
- A bilingual, online open educational resource (OER) College Guide to the SDGs, featuring Canadian promising practices for embedding the SDGs in all aspects of our post-secondary institutions
- A webinar series on the SDGs, in both official languages, for the college and institute sector. Topics to include: Demystifying the SDGs; Diving Deep into SDG 4; the SDGs and Curriculum; Student Engagement and the SDGs
- A PowerPoint presentation and workshop plan on the SDGs, to be updated and offered throughout 2020-2021
- A refresh and re-launch of CICan's Pan-Canadian protocol for Sustainability, using an SDG lens
- A pilot of an SDG mentorship program, twinning institutions more advanced in their work with the SDGs with those seeking to scale up quickly

Lessons Learned

- Appetite for collaboration is high
- SDGs are a useful and welcome rallying force
- Students are central, as both participants and recipients of any effort
- Resources must be made available to ensure capacity (both at CICan and our members)
- Working virtually and across time zones is challenging and requires some face-to-face time
- Engaging students has a financial implication
- Ensuring full diversity of views takes extra time and effort and funds

“ I thoroughly enjoyed meeting passionate higher education professionals across the country. Having the opportunity to meet, brainstorm, and connect in person in Ottawa was incredibly valuable. It meant we were quickly able to mobilize and shift the focus of our project to respond to COVID-19 in a coordinated way.”

**Amy Spark, Sustainability Coordinator,
Bow Valley College, Campus Sustainability
Project Working Group**



Scaling Social Purpose in Administration

Canadian Association of University Business Officers: Social Purpose Administration and Finance

How it Relates to the White Paper

The White Paper identified five sets of instruments that could be catalyzed by institutions to accelerate and scale social progress. At the May 2017 meeting Presidents identified that two of these – financial and physical assets – were comparatively under-developed from a social impact perspective. They suggested that the McConnell Foundation reach out to the Canadian Association of University Business Officers (CAUBO) to consider partnering to advance these ideas among its membership. In 2018 CAUBO and McConnell launched a partnership to explore how university financial and physical assets could be leveraged to build social infrastructure.

Note that this project also engaged administration and finance professionals working for colleges and institutes. However, this summary focuses on the CAUBO partnership whose members are primarily university administrators.

A 20-year vision was informally adopted by the partners, as a component of the White Paper's larger vision to unlock and maximize post-secondary capacities to strengthen Canadian communities:

Project 2040 Vision

In twenty years, the mandates of administration and finance departments at Canadian post-secondary institutions have been redefined to include community and societal well-being as a core component. Administrators are equipped with the knowledge, insights, capacity, networks and resources to effectively execute these new roles and are encouraged by their institutional and public stakeholders to deliver this dual mandate. More Canadian communities are prospering, students are



better educated, staff are fulfilled, and institutions are thriving in part due to the societal contributions and innovations of administrative functions. Other public and private sector organizations look to higher education institutions for partnerships, inspiration and ideas. This contributes to Canada becoming a global leader in community-engaged post-secondary.

Objectives

The project's main objective is to identify 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. The aim is that eventually all core administrative functions will have a more explicit social component. This initiative is designed to:

- Outline these opportunities
- Learn about and overcome the barriers
- Support advanced education administrators in building the capacity of their institutions in this evolving field

Consultations

The project started by consulting CAUBO members regarding the concept of social purpose finance and administration, including the opportunities and barriers to accelerate and scale this effort among post-secondary institutions in Canada.

Over 150 CAUBO members were consulted on the topic at CAUBO's 2018 Conference.

These are the highlights:

- Considerable work is already underway on social purpose administration and finance; there are many good practices to be shared

- Social purpose admin and finance requires a senior champion at the institution to be successful
- It needs to be included in the university's strategic plan for it to become an institutional priority

“ Some institutional strategic plans incorporate social outcomes at a high level, and some do not. Many do not address social purpose admin and finance explicitly and there are differing opinions about the merits of that and whether it should be primary or secondary. However, all agree that strategic plans should create the mandate for admin and finance departments to innovate and scale their social impact.

— 2018 CAUBO Conference Consultation Findings

Due to the finding that social purpose needs to be included in the strategic plan for it to become an institutional and administration and finance priority, a further consultation was held in September 2018 with 14 Presidents and VPs of Administration and Finance on the degree to which embedding a mandate for social purpose administration and finance within institutional strategic plans would be valuable, and if so, what, if any support, guidance or advice would be useful in this effort. These are the conclusions from the consultation:

- **Strategic Plans:** Institutions developing new strategic plans seek ideas on how to create a social infrastructure mandate for admin and finance within the new strategic plan. Institutions that have an existing plan would like a framework, lens or set of guiding principles that can be used in plan adjustments or in tactical execution, so that admin and finance can get direction from



What is Social Purpose Finance and Administration?

- Integrating social and environmental objectives into administration and finance functions, roles, decisions, and behaviours to benefit the institution, students, and communities.
- Harnessing administration and finance tools, assets, resources, and relationships to innovate, accelerate, and scale social impact.
- Aligning job purpose with social purpose, where all administrative jobs have more purpose and contribute to social impact.

the high-level strategic plans. Having such a lens or framework can help staff understand the roles they are currently playing and reveal a roadmap to do more.

- **Education:** Best practices, education and professional development are key enablers. It is felt that admin and finance teams need inspiration and information on how to embed social outcomes in their roles and functions. To address this capacity and training gap, conferences, workshops, webinars, case studies and onsite training were recommended. Peer cohorts on topical social purpose admin and finance issues are a recognized and valuable approach.

- **Community Collaboration:** There is a desire for tools, resources and case studies of finance and admin engaging external stakeholders (e.g. public, private and community sectors) in social purpose admin and finance projects.

CAUBO also conducted a Fall 2018 survey of its members to better understand their educational priorities for social purpose administration and finance. The following education topics were a priority for the 140 survey respondents:

- Strategic Planning for Social Purpose Administration and Finance (60%)
- Sustainable Behaviour Change on campus (43%)
- Community engagement approaches to engaging external partners in social purpose administration and finance projects, such as business, industry, community and government sectors (42%)

These consultations resulted in a focus on the following initiatives and activities.

2018-2019 Initiatives and Achievements

Awareness and information

- Published a primer to introduce the concept: **“Social Purpose Administration Primer: Using Financial and Physical Instruments to Build Social Infrastructure”**
- Profiled the topic at two national conferences
- June 2018
 - Conference Plenary delivered by Andrew Petter, President, SFU
 - Two-part workshops held with 150 participants introducing and consulting on the topic
- June 2019
 - Pre-Conference Session on Community Impact Procurement (40 participants)
 - Conference workshop on community engaged administration (60 participants)

- **University Manager magazine** included profiles in two issues:
 - Fall 2018: “Higher education, higher purpose: Using financial and physical instruments for social purpose administration”
 - Summer 2019: “Community-engaged administration: Growing interest in harnessing administration for community good”
- **CAUBO’s website** includes a project summary with links to more information

Case Studies

- CAUBO distributed a survey to its members to identify examples of social purpose administration and finance to include in a **Practice Inventory**. The inventory includes 60 vignettes from over 30 institutions. It can be accessed via CAUBO’s website
- CAUBO’s Quality and Productivity Awards program encouraged social purpose administration and finance submissions in 2019 and 2020. There were six such submissions in 2019, out of 21

“ We have a knowledge gap. We hire consultants to help us do this kind of work and build their capacity rather than our own.

— Social Purpose Administration and Finance Workshop participant

Professional Development

- **Webinar Series:** Two webinars have been held, one on sustainable procurement (44 participants), and another on equity, diversity and inclusion (101 participants)



2020+ Plans for the Initiative

The following activities are planned and underway for 2020.

Professional Development

- Hold four webinars in the Webinar Series (2020 and 2021)
 - Post-secondary Institutions and the Climate Emergency
 - Strategic Planning Guidelines
 - Sustainable Behaviour Change
 - Indigenous Reconciliation
- Hold a Regional Social Purpose Administration and Finance Workshop in BC

Reflections and Lessons Learned

Professional Engagement

There is a high degree of interest from CAUBO members in the topic to learn about best practices and from each other. Webinars and conference sessions are very well attended, showing a high degree of interest in these topics.

There is potential for collaborations among institutions to share in the development of new practices. This opportunity has so far been relatively unexplored – the workshop in Halifax was one exception. A high degree of interest in cross-institutional collaboration was expressed by the six institutions represented.

Admin and finance professionals are already involved in many initiatives, but they are mostly organic, sporadic activities and one-off projects that are opportunistic and ad hoc.

“ This workshop got me thinking beyond my normal mindset.

— Social Purpose Administration and Finance Workshop participant

- **Regional Workshops:** Four educational workshops were held on the topic over 2018 and 2019 in BC, Saskatchewan, Ontario and Nova Scotia. Twelve institutions have participated to date, involving about 60 administration and finance professionals in workshops to learn about the project, identify current practices and consider how to scale up social impact through administration and finance in the future. Evaluations reveal that participants value sharing perspectives and experiences, learning practical examples of how this can be implemented in institutions, and thinking outside of their normal work responsibilities. Many commented that they felt enthusiastic, educated and inspired.

“ For institutions who have this in their DNA, the opportunity is to develop strategic goals, targets and metrics for greater direction, impact and accountability (rather than take it for granted).

— Social Purpose Administration and Finance Workshop participant

Their top barriers include:

- Lack of mandate, time and resources; too many other priorities
- Lack of knowledge and practical examples
- Need for pathways to work with teaching, research and community
- Entrenched systems and mindsets

Community Engagement

Administrators perceive themselves to be “pre-ad hoc” on community engagement. They comment that it can be a challenge identifying community organizations to collaborate with. Many are involved on community boards which is an underleveraged opportunity.

CAUBO Engagement

CAUBO was instrumental in accelerating this concept among administrators. The organization readily embedded it in their professional development, award and communications platforms. While this level of engagement is sustainable over the long term, the Association has signalled that further engagement (e.g. in the form of more substantive projects) will need to relate to issues that form part of its analytical agenda, and are identified and prioritized on the basis of member consultations held through a formal project prioritization process. Current topics identified through this process include, amongst others, Mental Health, Climate Change/Sustainability, Equity, Diversity and Inclusion (EDI) and Indigenous Reconciliation.

Some CAUBO members comment that CAUBO’s functional communities of practice (COP) could be asked to explicitly include social purpose in their mandates so it is not treated as a silo activity. Judging by the 2020 pre-conference sessions (cancelled due to COVID-19), most of them are already doing so. (COPs include procurement, HR, facilities, finance, academic administrators, internal audit, risk managers, treasury/investment, taxes.)

Only 35 colleges are members of CAUBO. The opportunity exists for more colleges to join CAUBO to benefit from these efforts. Colleges and Institutes Canada does not have an equivalent organization within its system.

“*Our collaboration with Re-Code to enhance the capacity of administration and finance professionals to contribute to the social impact of their institutions has helped me see how much my members were already doing. It also helped administrators deepen their knowledge of how to make a greater impact through their everyday roles.*”

— **Nathalie Laporte, Executive Director, Canadian Association of University Business Officers**

Institutional Engagement

There is considerable commitment to these concepts at the institutional level, but according to the consultations, many strategic plans do not provide formal mandates for Administration and Finance departments to pursue these ideas – it is not embedded in operational plans.

“*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.*”

— **2018 CAUBO Conference participant**

Often administration and finance departments lack multi-year strategic plans, so this is not currently a route to mandating functions to become engaged.

The opportunity exists to cascade the Social Infrastructure Strategic Planning Guidelines (see next section) into other strategic plans such as operations, facilities, capital, academic, research, sustainability, etc.

Both the Regina and Halifax workshops identified the opportunity to embed these ideas into performance management. This could include embedding social impact into hiring, job descriptions, performance objectives and reviews. A draft tool could easily be created for this purpose, and a group of pilot institutions could be recruited to test it out.

“ We need a performance management tool that includes suggestions for embedding social impact into job descriptions, hiring, performance objectives and leadership development into all administration roles, including the President.

— Social Purpose Administration and Finance Workshop participant

Sustainability Engagement

Many institutions have a sustainability department and professionals who champion these efforts on their campuses. There are several existing benchmarks they are using to identify and address gaps. The most mentioned was STARS: The Sustainability Tracking, Assessment & Rating System. Another benchmark is the Carnegie Classification Standard, however, it does not fully address the role of the admin and finance department in community engagement/social infrastructure. There is reference to leveraging hiring, procurement, cultural /athletic offerings and library services, in different sections.



Professional Association Engagement

While not explored, it is likely that many administrators belong to other professional associations, for example, Professional Accountants, Supply Chain Management Professionals, Governance Professionals, Human Resources Professionals, etc. The opportunity exists to focus training and professional development with the associations that represent these functions. In doing so, other professional groups can benefit. The national association that represents professional associations is the Canadian Society of Association Executives.

Cross-Sector Engagement

The opportunity exists for institutions to collaborate with other public sector organizations and larger companies in developing and sharing best practices as they all have similar functions. For example, in the consultations it was suggested that collaborations with other public sector bodies such as municipalities and health authorities could be beneficial as they have established community relationships and practices that could be tapped into.

Doing so could raise the performance bar for all organizations, accelerate social outcomes, build social capital and foster community resilience.

Embedding Social Infrastructure Into Institutional Strategic Plans

Social Infrastructure Strategic Planning Guidelines for Post-Secondary Institutions

Objectives

Post-secondary administrators shared that often their institution's strategic plan provides limited scope for social impact and that in the absence of this direction, they didn't have a mandate to advance social outcomes through their roles and functions.

As a result, the objective of this initiative is to prepare, test and improve a set of strategic planning guidelines post-secondary institutions can use to inform their strategic planning in order to set a stronger mandate for advancing social infrastructure.

How it Relates to the White Paper

The White Paper is a call to action to institutional leaders to harness all their assets to address societal challenges and enhance social outcomes locally and globally. In order for this vision to be realized, institutions need to embed this ambition in their strategic plans. Thus, by developing and sharing strategic planning guidelines for advancing social infrastructure, the initiative can provide leaders insights and tools to take their strategic plans to the next level of impact.

“*St. Michael's College benefited tremendously from the insights of the Social Infrastructure Strategic Planning Guidelines for Presidents. We used the tool to stretch our thinking about how we can further unlock our institution's assets to contribute to creating a sustainable future. I encourage other institutions to consider its insights when updating their strategic plans.*

— **David Sylvester, President and Vice-Chancellor, St. Michael's College**

Target Audience

The target audience for this initiative is Presidents and their strategic planning teams. They are encouraged to use these guidelines to challenge and stimulate the social impact potential of their strategic plans.

Achievements to Date

In 2019 a scan was conducted of nearly 20 universities that included “social infrastructure” in their institutional strategic plans in order to identify a typology of practices that could be included in a set of strategic planning guidelines for social infrastructure.

Version 1.0 of the **Social Infrastructure Strategic Planning Guidelines for Post-Secondary Institutions** was published in the Fall of 2019. The purpose of the Guidelines is to provide ideas and options for strategic planning teams to consider when they are renewing their institutional strategic plans.



Six institutions are participating in a pilot project to test-drive the Guidelines in their strategic planning:

- University of St. Michael's College
- OCAD University
- Simon Fraser University
- Saint Mary's University
- HEC Montréal
- University of Regina

In response to COVID, Re-Code turned the Strategic Planning Guidelines into a **"COVID-19 Decision-Making Social Impact Tool for Higher Education"** and shared it at an Ashoka University event in April 2020. Social impact institutions were encouraged to use the distilled set of insights to inform the strategic decisions they are called upon to make during the COVID crisis.

2020+ Plans for the Initiative

The following activities are planned and underway for 2020.

Board Governance

- Hold a Presidents Panel Discussion at the Canadian University Boards Association May 2020 Conference in Moncton, NB on "Maximizing Universities Capacities to be Community Builders"
– **postponed due to COVID-19**

Strategic Planning Guidelines

- Determine a way to cascade the Strategic Planning Guidelines into other layers of strategic planning, such as operational, facilities, capital, sustainability, academic and research
- Draft case studies of the institutions that have used the Guidelines in their institutional strategic planning

Social Infrastructure Decision Lens

- Turn the Strategic Planning Guidelines into a Decision Lens to embed social impact into institutional decision-making

Reflections and Lessons Learned

- Universities use diverse terminology to describe their ambitions from social impact, to social infrastructure to community engagement
- The social role of technology is an emerging strategic planning focus
- Leaders recognize that they need to cascade their institution's social ambitions into other strategic plans in order to fully realize them



A Note on Reconciliation

The 2015 Truth and Reconciliation Commission's (TRC) Calls to Action spotlighted the role of education in advancing reconciliation.

Universities and colleges are now making significant efforts to do so, many with an acknowledgement that this work is long overdue. As such, any retrospective on social impact in the post-secondary sector would be incomplete without mentioning reconciliation. Indeed, the nature of social infrastructure, and its connection to community engagement, helps lay the groundwork for relationship-building that is a key element of reconciliation. **The righting relations work of reconciliation contributes to the mindsets and culture change needed to support deeper community engagement and increased social infrastructure. The two efforts are complementary, but different.**

At the same time, assessments on the progress toward the Calls to Action vary significantly. Some commend the achievements that have taken place, noting structural transformations such as decolonization of governance, shifts in tenure processes that orient and incentivize toward deep engagement with communities, and hiring of Indigenous advisors into levels of senior decision-making power. Others would counter that examples are too rare, that there is a tendency toward superficial "tweaks" over structural shifts and reallocations of power, and that the absence of these things means that the sector is hardly closer to reconciliation than it was at the start of the TRC. All however would agree that there remains much work to do.

Collaborating for Social Change

The British Columbia Collaborative for Social Infrastructure

Objectives and How it Relates to the White Paper

The BC Collaborative for Social Infrastructure (BCCSI) was launched in 2018 in response to the influential 2017 Paper and Presidents' Roundtable and through support of the McConnell Foundation. Each of the four founding institutions has a strong desire to collaborate to build our respective social infrastructure for strengthening communities and to be part of systems change in the post-secondary sector.

Together the institutions have committed to:

- Share practices, policies, tools, and relationships involving instruments used to advance social progress and build institutional capacity
- Assess the initiatives to determine whether they can be scaled-up or transferred/ connected with another institution. Consider whether effort, individually or collectively, can be also focused on new areas for social infrastructure action
- Create a community of practice among post-secondary institutions in BC connected to other efforts across Canada

Target Audience

The founding members of this initiative are the British Columbia Institute of Technology (BCIT), Simon Fraser University (SFU), the University of Northern British Columbia (UNBC) and Vancouver Island University (VIU). The presidents of these four institutions entered into a collaboration agreement in June, 2018. A small enabling group includes vice-presidents and strategic advisors and there are several dozen participants involved across the four areas of action, including faculty, procurement specialists, Indigenous leads and scholars, sustainability leads, and librarians.

Actions to Date

Four areas of action are being pursued where participants have collective strength and the results can be integrated and impact sustained. Areas that matter to students and communities and that help participating institutions address the calls of the Truth and Reconciliation Commission were prioritized.

Community Scholars : Librarians at SFU, VIU, and UNBC have collaborated to expand the support and engagement offered to Community Scholars across BC. This initiative makes access to the latest research and knowledge to charitable and non-profit organizations through agreements with seven publishers of academic publications. The addition of Thompson Rivers University has expanded the reach of this program to BC's interior. Over 500 community organizations across BC are now participating in the program. (See **Community Scholars Program** for more information.)

“ We wanted to thank the Community Scholars Program... It has helped us (a community-based non-profit agency) to address a variety of issues in an evidence-based way, from strengthening cultural connections for Indigenous children in care, to researching innovative youth engagement and complaints processes, to developing a unique culturally-based model for staff support...Sharing our learning in this way supports our vision of a harmonious and balanced Aboriginal community.



Social Procurement: The four institutional procurement leads in the BCCSI share a commitment to deliver social value through their institutional procurement operations which have a combined spend in the hundreds of millions of dollars. Participants seek to leverage collective purchasing power to drive social value using existing practices shaped by innovative ideas and create a platform of social procurement practices. This collaboration is focused on poverty reduction and community engagement. A project to build a social procurement toolkit is near completion. To foster social procurement efforts across the sector, the BCCSI will make the toolkit available to all post-secondary institutions.

2020-2021 Plans for the Initiative

Efforts over the next two years also include two other areas of action.

Community Building through Green and Sustainable Campuses: The initial focus area is “Food Systems, Green Campuses, and Resilient Communities”. Food had come to the forefront even prior to the COVID-19 pandemic, given issues around and solutions to climate action, ecosystem regeneration, social infrastructure, equity, and resilient communities. Emerging research from respected sources is bringing attention to the important role food can play in linking environmental, social, and economic issues. The project under development focuses on building and/or scaling sustainable and just food system initiatives at all four universities that are place-based, reduce campus carbon, land, and water

footprints, and contribute to social impact goals such as equity, diversity, inclusion, and Indigenous resurgence.

Indigenous Social Innovation: A workshop in June, 2019 has resulted in a shared institutional inventory of Indigenous initiatives, policies, and practices. Areas of potential action in 2020/21 include:

- Building a community of practice and learning cohort to review projects and share experiences
- Collaborating in building new curriculum needed by Indigenous learners and delivered in community and in new ways including micro-credentials. Consider gaps for mature learners that want to start businesses
- Showcasing examples and stories of economic reconciliation and broadening the understanding of economic development
- Identifying and sharing policy innovation (eg VIU remuneration of elders and knowledge keepers) and promoting new approaches and policies to institutions and government
- Creating an understanding of how best to build partnerships with Indigenous community voices. Understand both good and bad practices

Reflections and Lessons Learned

Connecting Across Institutional Types and Geographies: Through the past two years, we are encouraged by the shared commitment to building social infrastructure and the large number of potential areas identified for collaboration. Many current mechanisms in the post-secondary sector are organized by institution types (e.g. research intensive or colleges). We are seeing how the BCCSI has benefited from participation by institutions of different types and also different geographies and communities. Rural institutions have many challenges but also opportunities given their deep and long-lasting local partnerships. For sector and system change, all institutional types must be involved, and their efforts connected.

Connecting Across Departmental Silos: Through the BCCSI we are forging new institutional partnerships as well as connecting people within our institutions that have not previously seen themselves as part of a community of practice. One example is the social procurement connection in supporting Indigenous businesses and communities.

Commitment at the Middle: We have chosen four areas of action that are vital but are also in areas of practice that involve very busy staff and faculty and turnover of people has slowed progress in some cases. We have learned that, in addition to presidential support, we need to ensure champions and leads are identified, especially at the middle of the hierarchy, and also combine the efforts of staff and academics who operate with different timelines and merit systems. Through the BCCSI we have discovered passionate staff who have been innovating on their own (and often in addition to their position duties) whose efforts have been important to acknowledge.

Burdens on Indigenous Communities: The other challenge felt most acutely in the Indigenous Social Innovation and Building Community through Green and Sustainable Campuses areas of action is the limited capacity of small Indigenous communities to engage. Many projects and initiatives are underway, and we need to avoid duplicating efforts and look for ways to connect this work. The BCCSI needs to carefully select activities that will make the greatest difference and contribute to our goal for larger system change in the post-secondary system. We have found the need to go slow to later go fast, to learn rather than attempt to lead, to do the important relationship building and inclusion of communities at the early stage of planning our initiatives.



“ On the benefit of coming together across institutions: “Post-secondary institutions have a convening power that other institutions don’t have... We need to be having these conversations for this deep work...the idea of listening is important in reconciliation.

Transformational Change Through Community Engagement Classification

Carnegie Foundation Community Engagement Classification: Canadian Pilot Cohort

Objectives

In 2018, sixteen Canadian post-secondary institutions were selected from across Canada to explore the Carnegie Foundation's Classification for Community Engagement, an elective classification that centres the principles of collaboration, reciprocity, and a recognition of the knowledge, perspectives, and resources of communities in all partnerships.

Established in 2006, the Carnegie Foundation's Community Engagement Classification is the leading framework for institutional assessment and recognition of community engagement in the US higher education context. The Carnegie Foundation describes the purpose of community engagement as a way to enrich scholarship, research, and creative activity; enhance curriculum through teaching and learning; prepare educated, engaged citizens; strengthen democratic values and civic responsibility; and, address critical societal issues by contributing to the public good.

In partnership with the Carnegie Foundation for Advanced Education, the Swearer Centre at Brown University, and the McConnell Foundation, the sixteen post-secondary institutions are collaborating in a learning community to determine, if desirable, a Canadian version of the Classification. As a part of the Canadian Pilot Cohort (CPC), each institution is engaging in a collaborative process of self-study, institutional learning, and critical reflection with the objective of transformational change deeply rooted in high-quality community engagement.



As a framework, the Classification recognizes that each institutional context is complex. Rather than evaluating the outcomes of a project, it is designed to gather information about how institutions align their social infrastructure to enable and facilitate community-engaged work across their campuses. It focuses on how institutions gather information, assess the quality and impact of current practices, and establish pathways for continued growth and improvement in key areas. By focusing on institutional processes, the Classification enables situated learning, sharing, and the development of best practices within each institution and across the sector. The goal is transformational change over time.

Here is where the goals of the J. W. McConnell Foundation's Re-Code initiative, the Carnegie Foundation for Advanced Education, the Swearer Centre at Brown University, and the Canadian Pilot Cohort meet with the same purpose.

How it Relates to the White Paper

In April 2017, the J.W. McConnell Family Foundation's Re-Code initiative and Simon Fraser University commissioned the paper, "Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Communities." This paper issued a call to action for post-secondary institutions to accelerate and scale their beneficial social impact in partnership with the cities and communities they serve.

The commitment of the CPC is, in part, a response to the Re-Code initiative's calls to action. The current pilot phase of the Carnegie CPC involves each institution completing a self-



study assessment, and, as part of that process, conducting critical reflection and thought-work across their multi-campus environments and with their community partner networks. Across the CPC, the result is thousands of interactions and discussions within institutions and community groups, and the formation of stronger community-college-university networks.

Participating Canadian post-secondary institutions hold the following values and goals in common:

- Co-creating and sustaining positive impact by establishing campuses as hubs for communities
- Commitment to strengthening a culture of shared-ownership and collaboration for engagement throughout organizations
- Raising up and living foundational principles and values of equity, diversity and inclusion; mutual trust, respect and accountability; sustainable approaches; healthy relationships; and, knowledge creation
- Strengthening inter-organizational relationships and participating in learning communities to share successful practices and approaches
- Seeking continuous improvement by reflecting on and implementing institution-wide measurements and evaluation methods of community engagement

- Demonstrating national leadership and an interest in shaping a future Canadian framework designed to magnify impact by supporting institutions and communities across the country in their partnership initiatives

In parallel with campus work within their own communities, the CPC meets monthly to share individual reflections and to ask questions with the other campuses involved with the pilot.

“ The Canadian Pilot Cohort is raising the bar for community engagement in Canada. Post-secondary institutions often compete with each other but through the CPC we are creating a space to learn together and to do better for all of our communities.

2020+ Plans for the Initiative

Later in 2020, a closing convening is planned where members of the CPC will, together, share highlights and critical reflections to make suggestions for how a community engagement classification might most appropriately be situated within the Canadian context.

If founded, the Canadian classification would be made available to post-secondary institutions in all communities across Canada. The purpose is to further establish a network of leading Canadian post-secondary institutions that are bound by an interest in self-assessment and quality improvement in their practices and approaches to community impact, building reciprocity in partnerships and co-creating in a mutually beneficial way.

If there is widespread interest in founding a Canadian Classification, the plan is for it to be drafted in 2021 with an application deadline set in 2022. The first set of Canadian institutions would then be classified in 2023.

“ I’m excited to see how and where the Carnegie Community Engagement Pilot goes. It is inspiring to see an established framework seek to change itself so it can better support deep institutional transformation and epistemic justice.

Reflections and Lessons Learned

Founding a Canadian Classification would provide Canadian institutions with a structured process of institutional self-assessment and self-study that includes gathering and reflecting on evidence that, in turn, leads to better understanding areas of strength and weakness. The process itself would offer opportunities for institutions to improve practice and advance community engagement on campus in the following ways:

- A recognition of relationships between those in the college/university with those outside the college/university that are grounded in the qualities of reciprocity, mutual respect, shared authority, and co-creation of goals and outcomes
- Identifying promising practices that can be shared across and between institutions
- Strengthening a culture of shared-ownership and collaboration for engagement as a way of bringing the disparate parts of the campus together to advance a unified agenda
- Demonstrating accountability that institutions are fulfilling their missions to serve the public good

As the Canadian pilot cohort can attest, the process of applying, itself, is a catalyst for change, fostering institutional alignment for community-based teaching and learning, scholarship and creative activity, as well as helping to crystalize an institutional identity around community engagement while offering opportunities to lift up elements of institutional mission and distinctiveness and assist in an institution’s strategic planning processes.



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Advancing Higher Education as a Force for Social Impact

Ashoka Canada Changemaker Education Program



ASHOKA CANADA
EVERYONE A CHANGEMAKER

Objectives

Ashoka Canada envisions a world where solutions outrun problems, and where everyone is equipped to effect positive change in the world. Through our programs, we identify, select and designate values-aligned post-secondary institutions (Ashoka Changemaker Campuses) and high impact social entrepreneurs (Ashoka Fellows). Together with this community, we advance our goal of creating future change leaders and accelerating needed systems change.

Canada's higher education institutions are crucial partners in large-scale efforts to inspire and train future leaders and agents of change. Changemaker Campuses (CMCs) go further than offering curricular and co-curricular opportunities for learners to experience changemaking. They purposefully and holistically integrate changemaking values in their strategic plans, their posture toward collaboration and partnership, their institutional identity, leadership development and organizational culture.

How it Relates to the White Paper

In 2017, the White Paper asked higher education stakeholders to consider: *"What capacities can [post-secondary institutions] unlock and maximize individually and collectively to help build social infrastructure for Canadian communities?"* "Social infrastructure" was defined as: the organizational arrangements and deliberate investments in society's systems, relationships and structures that enable society to create a resilient, just, equitable and sustainable world. It includes social, economic, environmental and cultural assets.

This question drives Changemaker Campuses. Through the CMC designation process, post-secondary institutions undertake a rigorous self-study in an effort to create optimal conditions for deep and sustainable transformation. According to their Manifesto, Changemaker Campuses believe in:

- Advancing higher education as a force for social impact
- Empowering students to lead and develop the skills of empathy, distributed leadership, collaboration and creative problem solving
- Investing in the continuous development of faculty and staff as educators and agents of change ("changemakers")
- Building mutually beneficial partnerships with local and global communities
- Operating in socially and environmentally conscious ways to model changemaking for students and other institutions and contribute to the vitality of people and the planet
- Measuring their impact and sharing results to advance the field of social innovation and changemaking in higher education
- Leading by example and actively sharing their learnings and best practices.

Change Leaders drive their institutions toward a posture of responsiveness to variations on the White Paper's social infrastructure question: How can our everyday actions and transactions be seen as opportunities to effect positive change both within and outside an institution's walls? And how can a commonly held sense of purpose be contributing to a collective good drive innovation and research in a virtuous cycle?



Initiating and sustaining innovative practices in universities and colleges is not easy. Building social infrastructure lenses into an institution's strategy and operations is an exercise in systems change. For Ashoka, the social infrastructure narrative, and the convenings and discussions it precipitated, generated an almost immediate uptick in direct requests for Changemaker Campus network insights and connections to campuses that were 'doing' social infrastructure.

When we listened to post-secondary leaders who, inspired by the White Paper, were grappling with the how of social infrastructure, we nudged the conversation toward the why; that is, the purpose that motivates the desire for change and sustains it when barriers inevitably arise. Working through the why, together as a campus community, is fundamentally important to cultivating an environment where the "social" in social infrastructure is considered far, far upstream of any desired impact metric.

And this brings us to the who: In our work with social entrepreneurs and intrapreneurs alike, we have seen that nurturing changemaking mindsets and culture is crucial to sustaining the momentum for institutional and field level change. For systems to change, you need people who believe the change is possible, who understand that making change is a collective effort, and who are skilled in bringing others with them in the effort. Belonging to an identifiable group or culture that shares common

language, tools, and approaches to learning, experimenting and working is an ideal laboratory for flexing collaboration muscles that push and pull the levers of change. These identifiable groups, such as the Ashoka U Change Leaders collective (connecting 43 global campuses, 7 in Canada) or the Re-Code grantees cohort, exist both within and across campuses. These support systems are essential to fuel courage, enhance well-being, and ensure accountability supports for those on the ground.

In order to create an environment that is conducive to experimentation and collaboration with external partners, the conditions for this work must be intentionally built – through relationships – into the policies, practices, and structures. Investment must be made in the recognition, support, and leadership development of people up and down the chain of power and influence.

The underlying premise of the concept of social infrastructure, or of a Changemaker campus, comes down to recognizing and honouring social connections. A person's or an organization's ability to effect social change is contingent upon their ability to work in common cause with others – to track a North Star of purpose and navigate the complex path of collaboration – this sense of purpose is the beating heart of social infrastructure.

Impact to Date

The White Paper provoked a series of informal and formal efforts to move post-secondary institutions closer to their identities as anchor institutions. We are encouraged by the momentum that has been building since the White Paper around the role and relevance of universities and colleges in their communities, and the particular attention to the potential power of connecting their massive and diverse resources to society's most important challenges. The narrative has wended its way through conferences, committees, working groups, op-eds, gatherings of various levels of higher education leadership. Champions and exemplars have emerged in the field.

Higher education rankings now consider campus' social impact; self-study processes (like the CMC designation process) enable campuses to assess and develop changemaking and community engagement capacities; and sector-spanning committees and advisory groups dedicated to strategizing for social impact in higher education have been established and trusting relationships are emerging in these sites.

Reflections

At the time of writing, Canadian post-secondary institutions are several weeks into the global COVID-19 pandemic that has required massive, rapid adaptation for university and college research, teaching and operations, and which has laid bare the vastness, complexity, and fragility of our interconnected systems. Higher education leaders are focused on crisis management but are also planning for the near and not-so-near futures. The silver lining of the deep disruptions precipitated by the global pandemic is that we are living through a radical experiment in change management in the redesign of higher education. Everything is on the table. And the rationale for interrogating the entire system and restoring and rebuilding our public higher education institutions AS anchor institutions has never been plainer to see.

Social infrastructure can and should be a guiding principle in the re-conceptualization of post-secondary education that will necessarily be undertaken by individual campuses and the field as a whole. We have had many years now to imagine and prepare ourselves for big systemic changes. We are in a moment of creative destruction and this calls upon us to practice what we preach and work together, with purpose and courage, to shape the future of post-secondary in Canada.

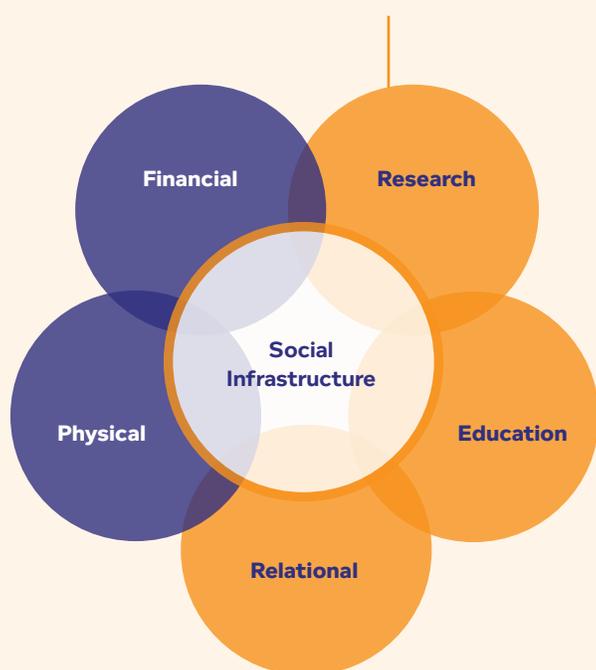


Appendix 1 – Case Study: How one university used the White Paper instruments to catalogue their efforts and identify gaps.

The following is a case study of how one university used the instruments identified in the White Paper to conduct a current state assessment of their institution.

Brock University Turns Institutional Asset Framework into Baseline Impact Tool

In 2018, after conducting a traditional economic impact assessment of Brock University, the President became interested in capturing and telling the story of the social impact of the institution. He recruited a faculty member in the Department of Sociology to define a methodology and conduct an analysis of Brock University’s social impact.



In July 2019, she began by conducting research into a variety of social impact methodologies in the UK, Australia, US and Canada she could apply to Brock. Among the approaches canvassed, the social assets framework (the flower) as set out within the paper **“Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Communities”** on p. 21 resonated the most. It allowed her to capture the full social value of a highly complex institution, given its adaptable and flexible nature. It had inward and outward facing dimensions and was positioned to demonstrate how universities could respond to multi-disciplinary issues they are uniquely positioned to address or redress. Its focus on institutional processes was a unique way of looking at the university.

To tackle this, she reviewed existing documents and conducted interviews across the university, including heads of units, deans of faculties, people running outreach programs, etc. They were asked to share the nature of the social engagements produced by their work. This information was captured in a draft working document referred to as a “catalogue”.

By cataloguing its efforts to build social infrastructure, the university can now:

- Determine and address the gaps
- Build on its strengths
- Identify cross-cutting themes that could be amplified across the university and in its messaging
- Tell the story of its social impacts to complement its labour market story
- Understand where its assets lie and begin a process to leverage or scale them for greater impact

It learned that the institution's impact narrative is greater than first appears, and that there are untapped people, passions and stories that could be mobilized for greater good.

“ *Assessing the social impact of universities requires an approach that can capture their highly complex form and scope. The social assets tool [found in the social infrastructure white paper] provides a valuable and nimble jumping off point for approaching the social reach of universities.*

**— Kate Bezanson, Associate Dean,
Faculty of Social Sciences & Associate
Professor, Sociology, Brock University**

Appendix 2 – Progress on the White Paper’s proposed “Agenda for Collective Action”



The 2017 Social Infrastructure White Paper set out 10 Collective Action Ideas to address the question “While there is no ‘one size fits all’ solution, could Canadian advanced education institutions benefit from a concerted collective effort to mobilize their assets and resources for greater societal benefit?”

The ideas were designed as thought and conversation starters, and focus on collective efforts to 1) activate the social infrastructure instruments within institutions; 2) further the development of social infrastructure; and 3) prioritize and address critical social issues in Canada.

The following chart evaluates progress on these Collective Actions to illuminate potential gaps and opportunities for accelerated collective work in the coming decade.

While it was never intended that these actions be formally advanced, it is interesting to observe that eight out of ten actions have progressed. Of those, two have advanced considerably: “social and sustainable procurement” and “strategic plan and benchmark”. The latter has evolved less intentionally, but has become one of the findings of this Milestone Paper, which is that associations are implicitly following a social impact rubric or pathway as they support their members on the social impact journey. Going forward, the Social Impact Pathway, found in the Executive Summary of this paper, can be used as a guide in the field-building and capacity-building work of associations and their allies as they seek to scale the social impact of the advanced education sector as a force for good in Canadian society and beyond.

Legend for progress bar below



= minimal progress or unknown



= some advancement



= considerable advancement



= proposed ideas achieved

1. Instrument Mobilization

Proposed Collective Action Ideas

Identified Actions to Date

Progress since 2017

A) Instrument Development: Collectively identify instruments where tools, knowledge-sharing and collaboration would advance social progress and build institutional capacity. Conduct a joint demonstration project to learn together.

- Social procurement
- Sustainable campuses
- Academic publications
- Indigenous social innovation



B) Impact Investment: Co-create a national impact investment fund (e.g. a national social infrastructure bank) to finance investments that address social and ecological challenges.



C) Social Procurement: Collaborate on a national social procurement initiative. Develop tools, guidelines and pilot projects, and use joint buying power to create social value from the institutional procurement process. Share lessons learned.

- Provincial collaboration on social procurement
- Toolkit to be shared nationally
- Joint buying power TBD
- Workshop on community impact procurement for buyers
- Webinar on sustainable procurement for buyers



D) Research Access: Establish a national “Centre for Social Evidence,” an open access research network, to improve access to research and evidence for governments, civil society, business and institutions. The Centre could capture, mobilize and synthesize data and evidence from across Canada so that policy-makers and practitioners could better access and use the insights in social policy decision-making.

- Provincial program, **“Community Scholars”**, provides access to academic publications to community organizations



2. Social Infrastructure Strategy

Proposed Collective Action Ideas

Identified Actions to Date

Progress since 2017

A) Strategic Plan and Benchmark: Develop a social infrastructure vision, goals and milestones for the post-secondary sector. Create a social infrastructure benchmark tool to help institutions assess and improve progress.

- Some national post-secondary associations developed vision, goals and milestones and identified social impact strategic priorities to include in their strategic work plans
- Social impact rubric for sector associations has been created
- Strategic planning guidelines for institutions has been published



B) Social Public Policy: Develop a coordinated public policy initiative with institutions and others to accelerate and scale government's role in supporting and strengthening Canada's social infrastructure.

- Advocacy planned to seek financial support for social engagement research fund
- Governments have been consulted on social impact priorities and areas for collaboration



C) Social R&D: Identify collaborative opportunities for post-secondary institutions to advance social sector innovation by supporting the innovation activities of charities and non-profits.

- Consultations have been held with civil society organizations to identify potential areas of collaboration and receive advice on the overall direction of the social impact initiative



3. Social Issues

Proposed Collective Action Ideas

Identified Actions to Date

Progress since 2017

A) Social Priority: Agree to a collective focus on a relevant and essential social issue (e.g. income inequality, First Nations reconciliation, climate change) that affects Canadians and mobilize institutions to address it through leveraging the instruments, cross-sectoral collaboration and other means.

Emerging social issue topics for multi-institutional collaboration:

- Education access
- Social entrepreneurship
- Food systems
- Climate emergency
- Indigenous reconciliation/ social innovation
- Equity, diversity and inclusion
- UN Sustainable Development Goals



B) Solutions Platform: Launch a multi institution social innovation lab or platform to co-create solutions with students, faculty and community partners across Canada.

- A university presidents cohort is exploring the creation of a Reconciliation Lab



C) Impact Metrics: Develop impact metrics that institutions can use to measure success and assess collective progress on priority social issues.

- Regional workshops are planned to explore how universities can measure social impact
- Considerable international academic research on social impact metrics has been conducted





McConnell

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