

# Guidelines for Integrating Social Purpose into Institutional Strategic Plans

Version 1.1 | 2020

**Background:**

*The McConnell Foundation prepared these Guidelines for Integrating Social Purpose into University and College Strategic Plans in 2019 and updated them modestly in 2020.*

*We welcome your feedback. Please submit your ideas to Coro Strandberg, Project Advisor at [coro@corostrandberg.com](mailto:coro@corostrandberg.com).*

## 1.0 Introduction

1 Universities and colleges are increasingly harnessing all of their assets to improve societal conditions, as documented in this discussion paper commissioned by Simon Fraser University and the McConnell Foundation in 2017: [Maximizing the Capacities of Advanced Education Institutions to Build Social Infrastructure for Canadian Institutions](#).

With a focus on continuous improvement, leaders are interested in understanding ways they can increase their social impact by embedding these concepts deeper into their strategic plans and institutions. This paper addresses this interest by introducing a set of questions that Presidents and their Planning Teams can use to stimulate ideas and stretch existing frameworks. These questions have been developed by the McConnell Foundation and tested by a group of institutions who guided the project. They are based upon a 2019 scan of nearly twenty Canadian institutions (one American) who had explicit social impact objectives in their strategic plans.

The practices and options described here focus on the societal aspects of institutional planning. Institutional missions, visions, values and goals go beyond these concepts into core mandate areas of teaching and research. These ideas are to supplement the other core aspects of institutional strategic planning. Students are at the heart of the advanced education mandate and central to catalyzing and scaling social innovation at institutions and beyond. Users of these guidelines are encouraged to consider how students can be engaged in bringing these ideas to life. Institutions that incorporate and go beyond these ideas are likely to find pathways to further enhance the student experience and student contribution.

## 2.0 How to Use the Guidelines

The Guidelines are organized into three sections:

- 1) Context
- 2) Vision, Mission and Values
- 3) Goals

The first section, 'Context', provides insights into current social purpose approaches within institutional strategic plans, including the degree of focus on the topic, external stakeholders in scope, terminology used within the plans, action words, structural options and stakeholder questions. This section can help strategic planners and strategy authors consider different ways to organize and frame the strategic plan to focus on social purpose and impact.

The second section, 'Vision, Mission and Values', provides insights into different approaches to updating the organizational architecture to include social purpose and impact. The third section, 'Goals', provides ideas and options for developing organizational goals focused on social impact.

### What are the Benefits?

There are many opportunities and benefits from further embedding social infrastructure into strategic plans. A top benefit is to better meet the expectations of a new generation of students looking for institutions that have an expanded civic footprint and high-impact educational experiences and careers. It can be a major reason top students, faculty and staff are attracted to work, learn and remain at an organization. Faculty and staff can be attracted to the institution to do things they were not able to pursue at their home institutions or previous workplaces. This approach can also make an institution's research more relevant and its relationships more meaningful. Its practices will predictably be more durable and impactful. By expanding its civic footprint, an institution can better harness community assets and address community needs, determining what to study and with whom. Networks can be built to support and serve faculty, staff and student enterprise for years. This approach can enhance the institution's influence and relevance – and thus impact – both locally and globally. Institutions cannot succeed in a failed community or society. Further, by investing in its communities in this manner, the institution can improve community quality of life, helping attract students, faculty and staff to live, study and work in its desirable locale. Other benefits include: Improves the institution's public reputation and brand; increases its ability to attract resources and meet the needs of more engaged stakeholders; and increases the attractiveness of its graduates to future employers, who increasingly seek students with these skills and perspectives. By generating broader public benefits, the institution can attract more support from governments and taxpayers. [Source](#)

Given the profound impact of COVID 19 on post-secondary institutions and the communities where they operate, another opportunity is opening up for institutions. Those that place social purpose and social impact more centrally at the heart of the institution are more likely to define the path of resilience, inclusion and justice for themselves and their stakeholders for the benefit of all.

## 3.0 Context

### Degree of focus on social impact goals within strategic plans:

- 20% of studied institutions include social impact in half of their goals
- 30% of studied institutions include social impact in one-quarter of their goals
- 50% of studied institutions include social impact in one-third of their goals
- Coverage in sub-goals ranged from 20 – 50%

### External stakeholders referenced in strategic plans included:

- Local communities, local and global communities; communities and geographic areas we serve; communities across the city and region, province, nation, and world
- Communities of interest near and far
- Community organizations; not-for-profit sector and NGOs (non-governmental organizations); social enterprises
- Francophone community
- Private sector, industry, business; community business
- Post-secondary institutions; educational and research organizations (local, national, international); libraries
- Governments, government ministries and agencies
- Indigenous communities
- Alumni, retirees, volunteers

### Diverse terminology in use:

- Social embeddedness
- Social engagement
- Community engagement
- Community impact
- Community innovation
- Social change
- Social impact
- Social innovation
- Social infrastructure
- Social justice
- Sustainability
- Sustainable development

### Action words in use:

- Improve, build, nurture, foster, develop, advance, strengthen, equip, enhance, address, provide
- Create, seek, explore
- Commit, ensure, provide
- Transform, catalyze, mobilize, shape, leverage, spur, spark
- Sustain, steward, safeguard
- Engage, collaborate, connect
- Expand, maximize, exceed, accelerate
- Champion, excel
- Inspire, promote, attract, lead, challenge
- Anticipate
- Renew
- Embed

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### Structural options:

- Stand alone strategy pillar focused on social impact
- Social impact embedded in all strategy pillars

### Action words:

There is a continuum of action words in use (see text box), from cautious (improve or anticipate) to bold and visionary (transform). Consider your choice of action words when developing your goals.



## Sample Consultation Questions for Purpose, Mission, Vision Statements:

Here are some sample consultation questions strategic planning teams can use when engaging institutional stakeholders in strategic planning. These questions can be used to inform purpose, mission and vision statements and address topics including and beyond core institutional mandates of teaching and research.

### External Stakeholder Interview Questions

- What societal issues matter to you when you think about our institution's impact on you and our local community?
- On what issues do you look to us for leadership?
- What do you expect of us in the coming years?
- What resources, capacities, strengths do we have that we can contribute to generating a positive impact?
- What positive impact do we have on society? Where can we make the largest positive impact?
- Are there any particular areas of our operations you believe are cause for concern?
- What do you consider to be our institution's role (or mission) in community / society?
- How does this role (or mission) impact you or your organization?

### Internal Stakeholder Questions

- What greater role do you believe our institution could play in the world?
- What could we accomplish in 10, 20 or 100 years if all obstacles were removed?
- What societal issues are being experienced by our students, faculty, staff and communities and how can we help?
- How do we grow our institution by addressing a societal challenge?
- What human need could we try to meet? Is there a wrong we could make right, an injustice or condition we can address through our institution?
- Why did you join our institution? Did anything stand out that made you want to come here?
- What do you believe is most unique or distinct about our institution?
- If you had a magic wand and there were no obstacles in your way, what is the one thing you would change about our institution? What would you never change?
- If our institution disappeared tomorrow, what would the world lose?
- Why is the world a better place because of our institution?
- What will future generations want to see from us?
- How can we make a difference with our institution?
- How do we effect change in our community / society? How much influence do we have?
- Why does a University conduct research and teaching? What is the societal benefit?"
- How does the University remain relevant in the age of a climate emergency?
- What is your favourite story about our institution?
- Why does our institution exist?

## 4.0 Vision, Mission, and Values

Here is a list of options and prompting questions for institutions to consider when developing or updating their mission, vision and values. They are intended for discussion and brainstorming purposes.

### Purpose versus Mandate

- Consider if you would like this section of your institutional strategic plan to reflect your Purpose (why your institution exists) or your Mandate (the aims of your institution).

### Optional Mission ideas

Consider whether any of these concepts are in your existing mission or whether you would like to have them in a revised mission.

1. **Serve needs:** Serve the social, cultural, economic, environmental and technological needs of our community (local) and/or of our society (province/nation/world)
2. **Change agent:** Act as transformative social, economic, environmental, cultural and technological change agents, addressing the questions of our time
3. **Build capitals:** Contribute to / build intellectual, social, physical, financial, natural and human capital
4. **Community development:** Build the economy and quality of life through community development
5. **Leverage institutional assets:** Harness all of the institution's assets to advance social infrastructure (e.g. teaching, research/data, student experience, physical, financial, and relational)
6. **UN SDGs:** Identify the UN Sustainable Development Goals which will impact your organization and which you can impact and incorporate them into your Mission
7. **Administration and operations:** Pursue ecological, social and economic sustainability through programs and operations, developing and modeling best practices
8. **Transformation:** Transform lives and empower positive change

**Prompting questions to guide your Vision statement** (the point of reference you are always working toward, the ultimate picture of success).

These are some prompting questions to help guide the development or refinement process:

1. Should your vision centre on your institution or on your community or the broader society?
2. What are your aspirations? What does success look like in the long term to advance your purpose/mission? What problem are you seeking to solve?
3. What external social, economic and environmental sustainability mega-forces will affect your institution, students, communities, suppliers and operating environment over the next 5 – 10 years? How can you adapt to and influence these forces in a positive way?
4. Given these factors, what long-term quest should you adopt? (This latter question could be incorporated into your scenario planning, environmental scan or SWOT.)

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### **Prompting questions to guide your Values**

You can use these questions to help you in developing or refining your organizational values.

- What values are needed for your institution to live out its purpose or mission and vision, and what behaviours collectively characterize those values? What behaviours flow from these aspirations?
- What behaviour traits will define your culture in the future? In the future, how would an outsider describe the behaviours they are seeing at your institution?
- What behaviours do you hope to inspire as a result of your purpose / mission and vision? Can those behaviours be summarized as values?
- What historical societal values does your institution uphold and how can they be elevated going forward?

## 5.0 Goals

Here is a list of options and prompting questions for institutions to consider when developing or updating their strategic goals. They are intended for discussion and brainstorming purposes. Note that these are summarized from the strategic plans studied in the 2019 scan and include a combination of goals and tactics.

*Question: Which of these strategic goal options appeal to you and your institution and will help you advance your mission and vision and live your values?*

### 1) Community Engagement:

- **Socio-economic development, sustainable community / rural development:** Catalyze the social, economic and sustainable development of our communities; play a key role in the economic development of our communities; turn our institution into a leader in sustainable rural development and environmental preservation;; contribute to the vitality and enrichment of the community; address economic and social needs for the prosperity of our communities; create positive change; foster discussion and solutions; enhance social, economic, environmental and cultural well-being
- **Economic and industrial development:** Grow our province's key, strategic sectors; maximize and leverage our industry, community and institutional partnerships to expand programs and partnerships in key national, regional and provincial industry growth sectors to align with government priorities; expand program pathways for key sectors through strategic post-secondary and community initiatives; use philanthropic investment to expand specialized, industry-focused learning experiences
- **Social responsibility:** Assume responsibility for overall health of the communities we serve; fulfill our responsibility for the broader community; fulfill our social, cultural and economic role

- **Community service:** Maximize opportunities for students, faculty and staff to contribute to community; promote a culture of service and engagement among students, faculty and staff; enrich the learning experience, teach civic responsibility, and strengthen communities; build community and professional skills; give back
- **Partnership building:** Build, enhance, increase, sustain respectful, reciprocal, mutually beneficial innovative and productive community connections, relationships, partnerships, and collaborations; foster and strengthen connections; embed the institution in the community
- **Cultural enrichment:** Make it easier for the community to enjoy our creative performances and visit our cultural spaces, libraries and art galleries; we use cultural activities and assets as a means to build community empowerment and capacity, resolve disputes, etc.

## 2) Societal Solutions:

- **Public good:** Impact on public good; foster the common good; build a better province, Canada and world
- **Global challenges:** Co-develop solutions to critical social, economic, technical and environmental issues facing the region in the 21<sup>st</sup> century; create solutions to local, national and global challenges; understand global trends and respond to the most pressing health and medical, scientific, social and creative challenges facing Canada and the world; use our comprehensive strengths to address deep and complex questions affecting our world; anticipate and respond to the rapid changes occurring in work and society; transform ideas into real-world advancements; test our plans by asking, “How will they improve impact and engagement for addressing complex world problems?”
- **Public dialogue:** Foster enlightenment and dialogue on key public issues; lead public discourse on local, national and global issues
- **Attract global faculty:** Attract scholars from around the globe to help build stronger communities

## 3) Community and Social Innovation:

- **Innovation ecosystem:** Develop a student and community problem solving network to become a vibrant focal point in a provincial innovation and entrepreneurship ecosystem; become the provincial hub for creative and balanced dialogue, innovation and entrepreneurship; harness human-centred / user-centred design approaches to generate useful and meaningful outcomes

- **Cultural and economic vitality:** Foster creativity, innovation and entrepreneurship to contribute to cultural and economic vitality, locally and globally; connect students with community innovators in collaborative spaces to spark local growth, economic development and social enterprise impact
- **Community innovation:** Accelerate community and social innovation and entrepreneurial capacity; spur local innovation and experiential learning directly linked to community business, environmental and social issues and opportunities; mobilize and strengthen our leadership in community innovation; through reciprocity build mutually beneficial relationships and foster co-created solutions
- **Campus assets:** Create a network of coordinated campus assets and resources that accelerate student and community innovation and entrepreneurship; ensure core community innovation elements – workshops/events, entrepreneurship programs, industry liaison and access to shared technologies – are present at each campus

#### 4) Catalyst:

- **City builder:** We are an active city-builder
- **Change agent:** Act as agents of constructive change; catalyze social change; operate as a catalyst for discovery and change; engage others in meaningful change; be a thought leader; advocate through mission-driven policy
- **Society transformation:** Transform society; challenge the status quo for the benefit of all

#### 5) Social Responsibility and Giving Back:

- **Fundamental responsibility:** We assume fundamental responsibility for the economic, social, cultural and overall health of the communities we serve; we take responsibility for the broader community
- **Give back:** Students, faculty, staff and alumni strengthen our city by giving back. They collaborate with community organizations and assist with shaping and advancing civic projects. By championing and contributing to community initiatives together, we will create meaningful and measurable change that benefits others

## 6) Equity, Diversity and Inclusion:

- **Diversity and inclusion:** Build a positive climate of respect, transparency, openness, inclusivity, and diversity on all our campuses; build a friendly, respectful, diverse, safe and welcoming university for all; ensure respect, co-operation, and inclusion among people of all backgrounds; committed to the success of our diverse students, cultures and communities; improve community access to our institution; be a welcoming and culturally aware place for all community members and partners; allow people to thrive

## 7) Indigenous Reconciliation:

- Advance decolonization and support Indigenous knowledges and cultures; engage Indigenous peoples and organizations through active and community-focused partnerships; develop a thoughtful, respectful, meaningful, and sustainable response to the report of the Truth and Reconciliation Commission of Canada; expand opportunities that contribute to the elimination of education and employment gaps between Indigenous and non-Indigenous Canadians; expand employment options and opportunities for Indigenous students and communities across the province; support Indigenous-led community economic and social development by leveraging our pan-provincial reach and network

## 8) Civic-Minded Students and Alumni:

- **Engaged global citizens:** Equip students with diverse and transformative learning opportunities that enable them to gain the knowledge, critical capacities, research skills and civic understanding required to become engaged global citizens and thrive and adapt in demanding and dynamic environments; shape the next generation of active, engaged citizens
- **Civic literacy:** Provide students access to an unparalleled selection of experiential learning opportunities that allow them to apply knowledge, grow as individuals, engage with diverse communities, develop entrepreneurial skills and refine their sense of civic literacy
- **Champions of a sustainable future:** Ensure that students have opportunities to engage with issues, principles and practices that support social and environmental sustainability, and to develop the knowledge and ethical orientation to contribute to a just, socially responsible and sustainable future

- **Alumni engagement:** Establish a stronger and more recognizable alumni profile to build our community together; support local alumni to become lifelong learners, seekers of new knowledge and innovation, and thought leaders in their respective disciplines, to become meaningful contributors and active citizens, locally and globally

#### 9) Transformative Research:

- **Societal benefit:** Research has purpose and impact; support and promote the full research continuum, from knowledge generation, through knowledge dissemination within the academic community and beyond, to application of transformative ideas for the benefit of society
- **Planet sustainability:** Excel in diverse forms of research and creative activity, innovation and knowledge mobilization that advance human knowledge, improve and enrich lives, tackle global challenges, and promote the sustainability of the planet; explore challenging and complex questions such as how to provide food for the world, and assess climate change impacts and adaptation strategies
- **Knowledge dissemination to society:** Transfer research results to the broader society, including policymakers, civil society leaders, and the community

#### 10) Technology for Good:

- **Social change data:** Data assets are used to better understand opportunities to drive positive social change
- **Data fluency and rights:** Communities on and off campus are able to use and analyze data and apply institutional analytics, artificial intelligence (AI) and data visualization skills to support societal outcomes; people have a right to access and analyze institutional data; the institution makes decisions with data in a democratic way
- **Technology purpose:** Emerging technologies are leveraged for public benefit and technological development is directed to maximize positive outcomes for all and contributes to creating equity; leading ethical practices are applied across the entire technology life cycle; act as a beacon in society for how technology can be used as a force for good

## 11) Sustainable Operations:

- **Stewardship:** Steward valued resources; support and sustain the resources we need to fulfill our academic mission and to help improve our planet
- **Leadership:** Provide leadership in safeguarding valued environmental resources
- **Future generations:** Safeguard valued environmental resources for present and future generations
- **High standards:** Our campus development and operations meet the highest standards of sustainability
- **Long-term:** Our long-term perspective recognizes our responsibility to be innovators and to continually work to reduce our ecological impact
- **Integration:** Build and support an integrated approach to social, economic, and environmental sustainability that incorporates teaching and learning, research, outreach, capacity building, and the operations that support them; embed sustainability principles, practices and literacy in programs and services, planning and operations and meet or exceed industry best practices for sustainability and safety
- **Social justice:** Sustainability is deeply rooted in social justice and is taken to encompass economic, cultural, social, and environmental sustainability
- **ESG:** We practice environmental, social and governance (ESG) sustainability

## 12) Holistic Institutional Sustainability:

- **Comprehensive:** We take a comprehensive and integrated approach to embed sustainability in every domain (research, education, community engagement and campus operations)
- **Institutional sustainability:** We advance cultural, social, environmental and institutional sustainability