External Review of the Sustainability Projects Fund

McGill Business Consulting Group

Presented to: Francois Miller

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Please note that all contents of this report are confidential until shared by members of the review committee

Executive Summary

The Sustainability Projects Fund ("SPF") is an integral part of the McGill community. The mandate of "building a culture of sustainability" has allowed McGill University to excel within innovative efforts in terms of sustainability. The SPF is the largest fund of its kind within North America that collects funding from students and the University for projects related to sustainability. The SPF has supported over 170 projects and has served the McGill community which is comprised of over 40,000 students.

Since 2013, several projects have been completed and through analyzing project data along with interviewing project participants the SPF continues to serve its mandate. Past participants have highlighted their experience as being filled with support and this exemplifies the state of the current SPF. The guidance by an external body of stakeholders ("the working group") allows perspectives to be brought to each project. The composition of the working group has been deemed satisfactory as it brings together students, staff, and faculty to share their opinions and represent their respective groups.

The financial and organizational structure of the fund has been deemed satisfactory. The finances that the fund possesses are used primarily for project funding and overhead costs. All financial decisions are made by the working group which ensures fair and transparent spending. Upon reviewing the organizational structure, it was made evident that the fund operates on an efficient basis where each role is required and takes ownership over a particular area.

Through conducting a thorough analysis of the fund, some recommendations were brought to light. The following four recommendations were made:

1. The Sustainability Projects Fund should increase its visibility and implement strategic, targeted communications in order to raise awareness of the impact of the Fund.
2. The SPF should continue to foster and invest in relationships with funding groups that provide similar funding for innovative projects within McGill; this will allow the SPF to reach new students and become more visible.
3. The SPF should implement an application tracker for project applicants to better understand their application's status throughout the application process. This will address applicant concerns regarding length and uncertainty in the process and increase engagement.
4. The SPF should create a community of past project participants willing to serve as a mentor for current or aspiring project team members by listing information online or creating networks through social media. The learning that can be shared through this network will allow for the creation of more polished content and ideas when applicants enter the process.

In conclusion, the SPF is currently meeting its mandate and has created a culture that promotes sustainability throughout the McGill campus. The fund is being managed by the appropriate individuals and the processing of projects allows for a holistic view of both the criteria that need to be met and the actual project plan. The fund continues to add value for its stakeholders.

Table of Contents

Detailed Report

1. Mandate Overview

The McGill Sustainability Projects Fund has engaged the McGill Business Consulting Group to perform an external review in advance of the referendum being held in 2017-2018. The last external cyclical review was performed in 2013. For purposes and relevance of this report all data examined will be post 2013 until Jan 21, 2017. This will allow for a more comprehensive and recent review. The mission of this report is to assess the ongoing relevance of the SPF, highlight the achievements of the SPF and ensure appropriate fund management.

2. About the Sustainability Projects Fund

The Sustainability Projects Fund ("SPF") was created in 2009 with the mandate to "build a culture of sustainability through the development and seed-funding of interdisciplinary projects." The SPF is funded through a "non-opt-outable" student fee of approximately $0.50[1] per credit from each SSMU, MCSS and PGSS student. This funding is then matched by administration and through these sources the SPF is generally able to raise an average of $870,000 per year.

The fund is available for all current members of the McGill community as they can apply for funding at any time and have their application reviewed by the working group. The working group is comprised of eight representatives from faculty, staff, and students who work independently to ensure "optimal achievement of the SPF mandate."

3. Understanding the relevance of the SPF

3.1 Environmental Analysis

To understand the relevance of the McGill Sustainability Projects Fund, it is first important to benchmark against peer institutions. This was done through analyzing a Peer Institution Fund Information benchmarking exercise performed by the SPF. This report shows 57 funds related to sustainability in universities across North America. **The SPF has a current fund value of $905,000 which is significantly larger than any other sustainable projects fund in among North American Institutions.** The McGill Sustainability Projects Fund is the largest fund that gains funding from the administration and students; any funds in North America that exist within this space that are larger have external sources of funding. Additionally, the SPF distinguishes itself from "revolving funds" as all funds are distributed to projects with no intention of having the funding returned[2]. This allows for project teams to continue investing in the sustainability of their project. Through the environmental analysis it was evident that the

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[1] Indexed from 2013 to 2018; was $0.52 in April 2017.
[2] Revolving funds are refilled with each project teams' return on investment. These work well within other context but for purposes of the sustainability fund a revolving fund would not be the most effective option

McGill Sustainable Projects fund is relevant within the space it competes in and provides accurate messaging.

Additionally, an analysis was done to assess the SPF's position within the internal McGill community by reviewing the funding mechanisms available for students.[3] **This analysis showed that the SPF is the largest and attracts the most value among its peer group at McGill and does not have any sources of competition in terms of funding.** This is due to the fact that the SPF operates in a niche space of funding for exclusively sustainability projects. Overall, the review of both internal and external positioning demonstrates that the SPF is a unique and noteworthy fund given its size, mandate and accessibility.

4. Assessing achievements of the SPF

4.1 Master Project Spreadsheet

A project master spreadsheet is maintained to list each application and project along with several criteria that are assessed. Each of the projects completed has been documented to show how much the project has raised, how many people have been impacted and what the key indicators of success will be. Through reviewing each project, the SPF can achieve its mandate of building a culture of sustainability. In order to further assess the impact of the SPF, interviews were performed with a sample size of project participants to better understand the role of the SPF in the project process.

4.2 Impact of SPF on project participants

A random sample size of projects implemented since 2013 was selected to gain an understanding of project participant opinions, the impact of the project, as well as pain points during the process[4]. Each project participant shared a positive experience and the projects that were selected have had an impact on the McGill Community. Each participant interviewed had a clear understanding of the relevance of the SPF. The SPF has marketed itself as a fund that manages diverse projects therefore participants are more likely to engage with the SPF than other funds on campus due to the flexibility and support that the SPF adds. The impact that the fund is having on the McGill Community can be clearly demonstrated through speaking with participants of the fund.

The interviews conducted with the project participants had the overarching goal of establishing the participant experience with the SPF along with why the SPF was chosen over other funding options. All interviews were conducted in person. All project participants shared a positive opinion on the SPF. When asked why the SPF was chosen as a source of funding the overwhelming response was that the SPF is one of the few funds that encourage innovation within the sustainability space. It was clear that throughout the application process participants were encouraged to express their ideas and not constrained. This section of the interview

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[3] Refer to Appendix B for further details on funding mechanisms
[4] Refer to Appendix C for further details on participants

clearly showed that the SPF is able to showcase a broad definition of sustainability and does not limit itself in terms of betterment of the McGill Community.

Understanding the process from the participant side was also a key insight gained from this initiative. All project participants interviewed applied through the new application process that was implemented in 2015 and expressed that the application process was quite extensive compared to the previous one-step application process. Though this seemed to be a pain point for some project participants due to the amount of detail needed to apply, it was understood as necessary by our review team. The questions require project teams to fully analyze the project and have a clear plan prior to asking for funding. This has acted as a substantial improvement since 2015. Previous to 2015, participants were asked for a work plan after the funding had been allocated. This caused several issues such as bottle necks and overall hindered the project implementation process.

Overall, each project participant when asked believed that the SPF was committed to the mandate of "build a culture of sustainability on McGill campuses through the development and seed-funding of interdisciplinary projects." All participants felt supported during the process and had little to say in terms of pain points within the process. **Through speaking with project participants it is clear that the SPF is having a positive impact on the McGill Community along with supporting innovative practices within the sustainability space.**

5. Communications and visibility review

The communications team for the McGill Sustainability Projects Fund works within the McGill Office for Sustainability which has the goal to display the full scope of sustainability work at McGill, with an emphasis on with multiple stakeholders. This goal is transferred to SPF specific mandates which are communicated through three main channels: multi-media, press and face-to-face outreach. These channels are aimed to reach a broad audience with a specific focus to make the SPF known to each and every student at McGill. The goal of reaching every student at McGill has been created in order to drive an increase in SPF applications. Additionally, the SPF wants to encourage the participation within projects, share impact of projects and to raise awareness around the SPF. The current communications team is composed on one Communications Officer along with three interns. Through speaking with the Communications Officer it was clearly demonstrated that each role is adding value and helping facilitate clear and effective communications. There has been a communications strategy developed which outlines the work that the communications will do in order to achieve objectives. This includes a social media strategy outlining an analytical approach to communications. **Through analyzing current communications, reviewing the communications strategy and speaking with members of the communication team the current communications are deemed effective.**

In terms of areas of risk, the current messaging may be lost on students who are not already interested in sustainability. This potential risk is being mitigated by a new campaign that will be launched which shows areas that students may not realize are being supported by the SPF. This

campaign showcases the diversity of projects that the SPF supports and allows students from different disciplines to engage. The launch and continuation of messaging that shows the impact that the SPF is having will allow for the achievement of the goal and mitigate the risk outlined.

In addition, it is recommended that a continued focus be placed on measurable metrics for communications. This is currently being performed for social media but other areas need to be targeted to allow for a focused approach on communications. The metrics should be implemented for all communications sent out via email publications along with view rates on videos on other content outside of social media. This will also allow communications that are being reached by the greatest audience to receive priority.

6. Assessing appropriateness of fund management through project approval process

6.1 Application Process

The applications for project funding are received throughout the year. Application forms are made available online for all potential project participants and this allows limited constraints in applying. There are two separate processes for applications, those for projects that are requesting less than $5K and those projects requesting greater funding. The applications for projects under $5K are accepting on a rolling basis and project proposals for those over $5k are accepted three times per year. In addition, over $5K applications are accepted between deadlines as time and space on the Working Group Agenda allows. The application forms are made available online which allows participants to have access to all information constantly and created ease in understanding how to fill and submit an application. The current application for projects both under $5K and above requires project participants to submit a cover page to list all relevant project information along with a project plan. The project plan form has been clearly designed to lead project participants to show the impact of proposed projects along with showing how this project will fit into the vision of the SPF. In addition, for projects above $5K a third form is required for additional measures of success for projects along with risk factors. This form encourages potential project participants to take a holistic view in analyzing their project before applying for funding. These forms help applicants think through and finalize the last details of their project process to ensure successful implementation.

There have been valuable changes made to the project proposal process over the past years. Previously, only one application for was used for any type of project. Through categorizing projects by request amount, the review process is more efficient for the working group and ensures that the appropriate consideration is given prior to asking for project funding. The newly implemented forms provide greater guidance in how to apply and ask specific questions to avoid any ambiguity in potential project participant responses. The application process is deemed appropriate as it ensures clarity and complete information for project proposals.

Through having this application process it can be ensured that all project teams that apply for funding have the goal to improve sustainability for the McGill community. This process ensures that the SPF is meeting its mandate and sending a clear message of sustainability to those interested in applying.

6.2 Project proposal process review

The project proposal review process can be broken down into three phases for projects over $5k. This process is similar for projects that are under $5K but participants within those projects do not partake in phase 2. This was analyzed through reviewing a process map created by the SPF to show each stage in the application and approval process for projects above $5K. The overall project approval process can be summed up in the following steps. Firstly, teams are asked to fill out the application form which can be found online on the SPF website. The SPF staff then reviews the forms and gives feedback to the project teams on how to improve their projects or better align projects with criteria. If the project is requesting over $5K project teams are moved on to the second phase. Once all forms have been finalized and submitted, they are shared with the working group who discusses the project proposal and decides whether it should be approved. As mentioned above, the project proposal process has been significantly improved since 2015. All teams are required to make a work plan which is shared with the working group. Through having project teams prepare this prior to approval the process is expedited. The working group has the knowledge to make appropriate decisions and once funding is provided projects can begin right away. This project application process allows for constant feedback from the SPF team. **The project review process is deemed adequate and adequately shows participation by the SPF at each stage to ensure that project applicants are engaged and submitting projects aligned with the SPF. Through having three stages of review it can be guaranteed that all projects will drive value and be executed.**

6.3 Working group analysis

The working group is comprised of eight individuals, four student members and four staff members both academic and administrative. The working group composition is deemed appropriate as it is made up of representatives from each stakeholder group and houses a diversity of individuals. The working group is responsible for making decisions regarding the funding of SPF projects along with the governance and administration of the SPF. In order to better understand the operations of the working group, interviews were conducted with four current and past members of the group, this included two students, one from a master's program and one undergraduate, along with one academic faculty member and one previous administrative staff member. The process of monthly meetings was explained along with the transfer of information. Each member that was interviewed seemed satisfied with the process around the working group. The monthly meetings were said to be consistent, well organized and conducted in an environment where all opinions could be shared.

Through providing project information prior to the meetings members are able to conduct an individual analysis before sharing their opinions with the rest of the working group. The working group is a vital component of the SPF as it allows for unbiased external decision making. The members of the working group are selected with the assistance of the SPF Steward and show case individuals that are truly interested in sustainability. Through having these individuals on board it is ensured that the SPF continues to meet its mandate.

A revamp of the meeting minutes in 2014 has shown that members of the SPF are given more ownership over the completion of tasks. In the new meeting minutes it is clearly demonstrated that action items brought up by the working group are given priority and assigned to the appropriate individual. Additionally, the terms of reference for the working group have been recreated at the end of 2014. Through comparing and contrasting the terms of reference from 2013 versus 2016 it is clear that the mandate and environment of the working group has been better detailed. Providing these terms of reference to the working group creates an environment that fosters sound decision making and discussion. All members are the working group are educated in the criteria for decisions along with what impact the decisions will have. It is deemed that the working group is provided with all relevant information in order to act as the decision making body for the SPF.

7. Fund Structure

7.1 Financial Structure

The financial structure of the SPF takes a two pronged approach. The funding is used exclusively to fund projects and to cover overhead expenses. The project side of funding is done through project funding originally awarded by the working group, as well as through budget amendments, as needed. The overhead expenses that are covered by the fund are staff salaries and other expenses approved by the working group. This practice ensures that only expenses that are relevant and beneficial for SPF are covered. In addition, a continually updated tracker is put in place to track all expenses along with budgeting for years to come. This process has been notably improved since inception. The previous versions of this spreadsheet did not track all changes and budgets were simply adjusted with no tracking of past changes. The new spreadsheet tracks all allocations and budget amendments along with the date/time that they were made. This allows for granularity and details around the finances that were never available before. Another addition that has been made is the ability to pull financial information into the spreadsheet through Crystal Reports. This allows the group to report on the status of the fund and the amount left available to allocate. **This financial information clearly shows what resources are available and drives the approval of spending for the working group.**

The organization of the financial structure does not call for any recommendation. Transparent practices have been put in place to ensure adequate fund management and through providing the working group with all financial information the SPF allows for a sustainable practice of

allocating funds to appropriate areas. Additionally, through having expenses approved by the working group any risk of misspending is mitigated.

7.2 Organizational Structure

The SPF is housed within the McGill Office of Sustainability (MOOS). MOOS is led by a director, who serves as the SPF Working Group Chair. The director supervises the SPF Staff, the SPF Steward and SPF Administrator. Additionally, other SPF responsibilities are shared by MOOS staff such as the Communications Officer, who oversees the communications for the SPF, and Sustainability Projects Coordinator, who coordinates the SPF Ambassador program. In order to assess the organizational structure the SPF administrator was asked for an overview. **The organizational structure of the SPF has been deemed appropriate. The organization seems to be structured in a way that allows for the most efficient use of SPF funding.**

Key Takeaways

Mandate Overview: • **McGill Business Consulting Group has been engaged to perform an external review on the management and appropriateness of the Sustainability Projects Fund**
Understanding the relevance of the SPF • **The SPF has a current fund value of $905,000 which is significantly larger than any other sustainable projects fund among North American Institutions** • **This adds value to the McGill Community and does not compete for any sourcing of funding**
Achievements of the SPF • **The SPF has helped facilitate several value-driving sustainability projects and the achievements are clear and identifiable**
Impact on SPF Project Participants • **All past participants have been satisfied by the support that the SPF has provided for their sustainability projects** • **The positive impact that the SPF has had on the McGill community is clearly demonstrated** • **The SPF has supported innovative practices within the sustainability space**
Communications and Visibility Review • **Through analyzing current communications, reviewing the communications strategy and speaking with communications team the current communications are deemed effective**
Application Process • **The application process is thorough and necessary** • **The application process clearly demonstrates that all projects are supporting the SPF mandate**
Working Group Analysis

• **The working group composition is deemed effective as each stakeholder group is adequately represented and a diversity of individuals are present**
Financial Structure
• **The financial structure is transparent and shows what resources are available for allocation by the working group**
• **The financial structure is appropriate and does not call for any recommendations**
Organizational Structure
• **The organizational structure of the SPF is deemed appropriate**
• **The organization is structured in a way that allows for the most efficient use of SPF funding**

8. Recommendations

Recommendation 1: Increase Communications and Visibility across Campus
In the short term, over the next year it is recommended that the fund focuses on communications and visibility. Our findings indicate that the SPF has had an impact on the McGill Community but this impact is not being adequately recognized by community members. It is recommended that the communications team interact more directly with project teams to share knowledge based on experience with the SPF and the impact it has made. These stories can be shared with communications and used to increase visibility and relatability. In addition, the SPF should conduct a targeting exercise to identify which groups on campus should be targeted and how to customize communications to these groups. Through increasing awareness and visibility of the fund, the SPF will benefit from increased applications and quality project ideas.

Recommendation 2: Collaborate with Peer Funding Groups in the McGill Community
Secondly, it is recommended that the SPF continues working closely with peer funding groups within the McGill community. In 2015, the SPF Staff created the Network of McGill Student Funds for Change to start building relationships with other funding groups. From this initiative, they were able to create a webpage hosted on the SPF website to communicate to applicants the funds that exist for them on campus. Even more opportunities could be pursued by the Network. There is a strong foundation for even more cooperation. Suggested short-term cooperation opportunities are issuing joint communications and organizing events to show this relationship.

Recommendation 3: Enhance Communications with Project Applicants
The project proposal process has gone through several valuable changes in the past years. This process has greatly improved but it is important to ensure that project participants are kept up to date with how the process is progressing once they have applied. It is suggested that a tool be implemented to allow participants to better engage within this process. An example of this could be a tracker that will show each step of the approval process and ensure that project

applicants stay engaged. It is recommended that further research be done to identify and implement the tool that would work best to increase engagement.

Recommendation 4: Create Mentorship Opportunities

Finally, it is recommended that the SPF takes initiative in creating a community of past project team members willing to serve as a mentor for current or aspiring project team members. This will allow the transfer of knowledge and will help produce better quality proposals, as well as provide a smoother transition into the project proposal process. This network can be created through social networks or mentor contact information on the SPF website. The SPF can reach out to past project participants and ask if they are willing to mentor new project teams in different areas such as idea generation, project implementation, and/or expertise in a certain area. This recommendation will allow more access to information for project teams and may free some time for SPF staff as the process can be discussed on a peer-to-peer basis.

Conclusion

The McGill Sustainability Projects Fund has continually been adding value to the McGill community. This fund is the main driver behind all sustainability initiatives on campus and has allowed McGill to be a leader within sustainability. The fund has helped facilitate a culture of sustainability and innovation; through having an open application platform they have allowed all stakeholders to be involved. The fund is adequately managed and all funding is going toward projects and supporting activities. Some areas of improvement have been identified through primary research but despite these areas the McGill Sustainability Projects Fund continues to be a vital part of the McGill community and all its participants.

Appendix A: Student Survey

The following survey was created to be distributed to the McGill student body. Due to time and logistical constraints, this survey was not conducted. It has been included for future use by the Sustainability Projects Fund.

What faculty and year are you currently enrolled in? *

Short answer text

On a scale of 1 to 5, how important is sustainability to you? *

	1	2	3	4	5	
Not important	○	○	○	○	○	Very important

Have you heard of the McGill Sustainability Projects Fund? *

○ Yes

○ No

If yes, how did you hear about the fund?

○ Orientation

○ MOOS/SPF Website

○ In-class presentation

○ Through a Friend

○ Sustainability Fridays

○ SPF Staff

○ SPF Ambassador

○ Other

Do you know any projects that were funded through the sustainability fund? If *
so, can you name them?

Long answer text

On a scale of 1 to 5, how important is it to have funding for sustainability projects? *

	1	2	3	4	5	
Not important	○	○	○	○	○	Very important

If you wanted to hear more about sustainability initiatives, how would you like to receive the information? *

○ McGIll Communications (i.e. emails/newsletters)

○ Social Media

○ Workshops

○ Other...

If you had an idea for a sustainability project, what would encourage you to apply to the SPF? *

Long answer text

Appendix B: List of McGill Funding Mechanisms

Funding Mechanisms

> 1. *Integrated Management Student Projects Fund (IMSPF)*
> 2. *Dobson Cup*
> 3. *Seeds of Change: Crowdfunding*
> 4. *Student Initiatives Funding*
> 5. *Sustainability Projects Fund*

Appendix C: List of Project Participants and Project Participant Survey

The following project participants were selected based on a random sample of completed and ongoing projects. Additionally, they were asked the following interview questions. These are provided for the reference of the Sustainability Projects Fund.

Project Interview Questions

> 6. *What is the project that you worked on?*
> 7. *Why did you choose to apply for funding at the Sustainability Fund?*
> 8. *What other funds were available to you?*
> 9. *Can you share your thoughts on the process with the sustainability fund?*
> 10. *Can you recommend some points of improvement for the SPF?*
> 11. *What was the timeline and communication throughout the process like?*
> 12. *Did you feel adequately supported by the SPF?*
> 13. *Would you like to share any recommendations?*

Selected Projects

> 1. *Green Light Microscopy*
> 2. *Where the Sidewalk Ends*
> 3. *Electric Grounds Equipment*
> 4. *Family Resources Coordinator*
> 5. *McGill Energy Project 2*
> 6. *Bellairs Research Institute Greenhouse*

Appendix D: List of Working Group Interviewees and Questions Asked

The following working group members were selected on a random basis to interview and help guide further understanding of workings of the working group. Additionally, they were asked the following interview questions. These are provided for the reference of the Sustainability Projects Fund.

List of Interview Questions Asked

1. *Why did you choose to join the working group?*
2. *How did you feel about the onboarding process?*
3. *What are your perceptions on the monthly working group meetings?*
4. *What do you like best about the working group?*
5. *What do you feel are points of improvement for the working group?*
6. *What recommendations would you like to make?*
7. *Any other thoughts that you would like to share.*

List of Past and Current Working Group Interviewees

One Staff Representative (Academic)
One Student Representative (PGSS)
One Student Representative (MCSS)
One Staff Representative (Administrative)