This report was prepared for the Board of Directors of the Federation for the Humanities and Social Sciences by a working group led by Christine Tausig Ford of Higher Thinking Strategies.
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About the Congress Working Group

In December 2017, the Board of Directors of the Federation for the Humanities and Social Sciences established an ad hoc Congress Working Group to provide advice to the Executive Director and Board on how best to meet the Federation’s strategic directions and objectives through Congress and other events. The Working Group was unanimous and emphatic in one respect: that this report represents only a first step toward the re-imagining of the role Congress will play toward the future shaping of humanities and social sciences education and research. The group’s emphasis was on the need to work “through and with associations” and in collaboration with the university members of the Federation. It is the hope of all members of the Working Group that this report will serve as a springboard for Board discussion and significant further member consultation.

Members of the Congress Working Group

Marco Fiola, Interim Chair, Department of Geography and Environmental Studies, and Professor, Department of Languages, Literatures and Culture, Ryerson University, and Academic Convenor, Congress 2017

Gayle MacDonald, Associate Vice-President, Research, Mount Saint Vincent University, SSHRC Leader and former Board Member, Federation for the Humanities and Social Sciences

Nicholas Ng-A-Fook, Professor of Curriculum Studies, Director of Teacher Education, University of Ottawa and Past President, Canadian Society for the Study of Education

Michael Eberle Sinatra, Professor of English, Université de Montréal, and Board Member, Federation for the Humanities and Social Sciences

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Rima Wilkes, Professor of Sociology, The University of British Columbia, and former President, Canadian Sociological Association

Coordination: Christine Tausig Ford, President, Higher Thinking Strategies Limited and former Interim Executive Director, Federation for the Humanities and Social Sciences

Note from the Congress Working Group: Thank you to the staff of the Federation for the Humanities and Social Sciences (hereafter “the Federation”), who have supported this report through research, information and input.
Recommendations

1. The Congress Working Group recommends that the Board of Directors continue to keep the needs and views of members uppermost in mind. This report should not be viewed as an end product, but rather as the continuation of strategic discussions with the scholarly associations and universities that make up the Federation.

2. The Federation should develop an opportunity/opportunities for greater dialogue with members, particularly scholarly association leaders, and including both volunteer leaders and association staff. This event could take the form of a transformed annual conference, which would aim to share ideas and insights on programming, trends and initiatives, and encourage collaboration among associations. A pilot project could be launched at a central location, supplemented by the use of communications technology to allow for greater participation among scholarly association leaders.

3. The Working Group concurs with staff plans to find a new approach to the Annual General Meeting (AGM), and to replace the formal AGM at Congress with roundtables that would allow members to share ideas and pose questions to the Federation and its leadership, held several times throughout the Congress period, so as to allow maximum participation.

4. The Working Group concurs with plans to better highlight the Canada Prizes ceremony, with a pilot project of working with the scholarly associations from which the winners are drawn to integrate the awards ceremony in their programming.
5 The Working Group recommends that Federation staff continue to strengthen member services to support scholarly associations and institutions, including efforts to bring these groups together to work in common cause.

6 Through discussions with associations and institutions, the Federation should find ways to encourage sessions at Congress that are more interactive, featuring dialogue and discussion aimed at enhancing the participant experience. This could also include greater use of technology.

7 Extend the Big Thinking lectures throughout the year by offering somewhat fewer on Parliament Hill, and, over time, planning a series of such lectures across the country.

8 Develop a new approach to Big Thinking during Congress by placing greater emphasis on a small number of high-profile scholars/speakers and programming Big Thinking lectures during evening times when there are fewer competing events.

9 The Working Group recommends exploring the possibility of standardized black-out times during Congress, potentially over the lunch hour, to allow more time for collaborative sessions or networking. Another alternative would be to encourage that all programming in this time slot be open to all Congress attendees.

10 The Board of Directors should task staff with developing a plan, including proposing how financial resources could be utilized, for more effectively supporting multidisciplinarity, to be considered by the Board at an upcoming meeting and to be further discussed with members.
The Working Group recommends a fundamental shift in choosing Congress locations, including:

- a. More proactive outreach by the Board and senior staff leadership of the Federation to identify locations and promote Congress among potential partners;
- b. A shift in the tenor of the relationship from “host university” to “partner university/universities,” which is designed to create a clearer and more harmonious relationship between the institution(s) and the Federation;
- c. Developing a long-range plan for Congress locations, with a cycle that would see Congress locations focused in or near major urban centres, with plans every three to four years to locate Congress in smaller or mid-sized centres;
- d. Supplementing campus locations with convention centres and other facilities such as hotels to provide greater flexibility; and
- e. Implementing greater discussion between the Federation and scholarly associations about future Congress locations, well ahead of time, as well as the ability to provide some input into the choice of Congress locations.

The Working Group recommends a slate of capacity-building initiatives related to financial sustainability for interested scholarly associations, including capacity-building sessions on issues such as multi-year member recruitment and retention; cash flow planning; and financial management generally, as well as developing communications materials such as “key messages” that would allow associations to highlight the advantages of participating in Congress to their members.

Scholarly associations should be encouraged to adopt multi-year memberships to even out any financial gaps in years where attendance may be lower.
The Federation should prepare an easily understood fact sheet explaining the costs and revenues associated with Congress and communicate these facts more effectively to its membership.

Ongoing strategic discussions among associations should be convened by the Federation to further discuss greater collaboration and transparency in setting registration fees for Congress, including exploring the possibility of grouping fees from willing associations into a single fee that would allow cross-participation.

The Federation and its members are encouraged to develop plans to continue to attract and retain two significant groups of participants to Congress: senior scholars and graduate students. These could include the development of a promotional plan and special events for senior scholars, and greater efforts to include senior scholars as speakers. For graduate students, the Working Group recommends increased emphasis on mentoring to supplement or refresh the current *Career Corner* initiatives. One possible approach would be to hold a one-day meeting just prior to Congress that would link graduate students with senior scholars, and that would focus on careers both inside and outside academia.

The availability of child care at Congress, as well as programming to make Congress a “family-friendly event,” would be helpful in attracting new participants, in particular emerging scholars.

Over the longer term, the Federation and its members should engage in strategic discussions on the impact of academic conferences on the environment and climate change.
The Working Group recommends a sustained, growing and meaningful emphasis on reconciliation and Indigenization at Congress and other Federation events.

It is recommended that the Federation make an explicit commitment to equity, diversity and inclusion (EDI), and develop an action plan for Congress and other Federation events to ensure continued progress.

The Federation should offer a clearinghouse service for scholarly associations wishing to internationalize their programming at Congress. This could include providing guidelines or information on initiatives undertaken by associations that have already significantly internationalized their participation and international outreach.

The Federation should develop linkages with major international scholarly organizations. This would include not only international associations that are meeting in Canada in conjunction with their Canadian counterparts, but also regular participation by the Federation, as determined appropriate and financially feasible by the Executive Director, in meetings of international research and higher-education-related groups.

Further exploration of technology initiatives should be undertaken by Federation staff, with a plan to introduce some pilot projects in upcoming Congresses. In particular, and importantly, the Federation should move quickly to implement an app that would allow easier navigation of Congress programming.
The Working Group encourages Federation staff to continue developing a new approach to communications, both externally and to the membership.

The Working Group recommends exploring new ways to reach out to local communities during Congress and other Federation events – and to demonstrate the value of community-engaged scholarship. This could add value to local communities, universities, and the scholars that are represented in the membership of the Federation.

The Working Group encourages further exploration of documentary films to mobilize and share research, as well as an overall openness to highlighting and experimenting with new forms of scholarly work at Congress and other Federation events.

The Working Group urges the Federation to place greater emphasis on celebrating the role of books in the humanities and social sciences, as well as more efforts to make Expo a lively and interactive space, which could draw greater participation among Congress participants and exhibitors.

The process of transforming Congress may well be as important as the transformation itself. Engagement, imagination, collaboration and good will on all sides are critical. So, too, is the willingness to take some risks. The Working Group encourages further discussion on its recommendations, and a long-term approach to continuing to build the premier event for humanities and social sciences scholars in Canada.
Introduction

The first Congress of the Humanities and Social Sciences took place at the University of Ottawa in 1998, attracting some 9,000 scholars to the nation’s capital. The scholarly meetings themselves have taken place since 1930 as the Learned Societies Conference, known affectionately as “The Learneds.” Congress today remains the largest multidisciplinary scholarly meeting in Canada, and annually attracts thousands of scholars to meet, talk, think and network.

Chad Gaffield, founding President of the Federation for the Humanities and Social Sciences and now President of the Royal Society of Canada, remembers the first Congress in 1998 well. “By renaming the meetings Congress, we wanted to open them up and invite the public to come. But no matter how much we highlight what’s going on, we still have to do the heavy lifting if we want to engage beyond the academic community.” And that, says Dr. Gaffield, may not be a weakness. “Congress plays an enormously important role. It’s an entry door and supportive environment for emerging scholars, and brings together collisions of people, new ideas and insights.”

Dr. Gaffield, like many in the humanities and social sciences community, continues to think about the role of Congress in Canada’s academic community, and to consider how today’s Congress can improve to meet the needs of scholars over the next decades. In that, he is not alone.

In December 2017, the Board of Directors of the Federation for the Humanities and Social Sciences established an ad hoc Congress Working Group to provide advice to the Executive Director and Board on how best to meet the Federation’s strategic directions and objectives through Congress and other events. The Working Group was asked to evaluate the strategic directions and objectives for Congress as well as to evaluate risks and emerging opportunities. (See Appendix A for the Terms of Reference for the Working Group.)

At a March 2018 Board workshop, the Directors went further in their instructions to the Working Group:

- Keep member needs topmost in mind;
- Think long-term;
- Identify potential pilot projects;
- Consider the needs of a new generation of scholars, and the new approaches to those needs; and
- Prepare to challenge assumptions and the status quo.
Throughout their deliberations – and the many member consultations that led up to this report – the Congress Working Group has taken the instructions of the Board to heart. The group has aimed to be ambitious in its thinking; eager to embrace new ideas and question orthodoxy; and innovative in identifying solutions.

In particular, the Working Group embraced the challenge to think creatively about the future of Congress. In doing so, however, it took into account the human resources and financial challenges inherent in the climate in which Canadian universities, scholarly associations and the Federation are working. Additionally, it considered the trends that are shaping higher education and research in Canada and globally -- trends that will continue to drive change in the future. These include not only the resource challenges, but also rapidly growing changes in how humanities and social sciences education and research are mobilized and shared with the public. Today’s researchers are working in an increasingly multidisciplinary, global, collaborative and digitally connected world. At the same time, it is an academic world that has grown more precarious. These trends are shaping Congress and other Federation events now and into the future.

The Working Group was unanimous and emphatic in one respect: that this report represents only a first step toward the re-imagining of the role Congress will play toward the future shaping of humanities and social sciences education and research. The group’s emphasis was on the need to work “through and with associations” and in collaboration with the university members of the Federation. It is the hope of all members of the Working Group that this report will serve as a springboard for Board discussion and significant further member consultation.

Ad Hoc Working Group on Congress
Federation for the Humanities and Social Sciences
October 2018
Consultations

As part of its work, the Congress Working Group, under the coordination of Christine Tausig Ford, President of Higher Thinking Strategies Limited, undertook a series of consultations, both formal and informal, to seek members’ and partners’ views. These included two member roundtables which were held at the University of Regina during Congress 2018; informal face-to-face discussions with participants at Congress and those who had responded to a Congress-wide request for input; discussions with members and with the executive of the Canadian Philosophical Association (CPA) at the CPA conference in Montreal in June; and one-on-one discussions with scholarly association leaders following Congress. Discussions were also undertaken with partners and stakeholders, which included a series of discussions with Social Sciences and Humanities Research Council (SSHRC) senior executives, and with the Presidents of the Royal Society of Canada and Universities Canada. In addition, SSHRC Leaders were invited to comment, and several of the SSHRC Leaders canvassed humanities and social sciences faculty at their institutions to provide consensus feedback. Consultations were also held with Federation staff, as well as several meetings with the senior staff leadership of the Federation and a discussion with the Board’s Executive Committee.

The Congress Working Group met several times by teleconference and held two face-to-face meetings, one at Congress in May 2018, and a second in Toronto in August 2018.

In coming to their recommendations, the Working Group also reviewed the results of the 2018 survey of Congress attendees, which had an approximately 20 per cent response rate, and a survey of Congress 2018 organizers, as well as previous surveys of Congress participants, exhibitors and host institutions.

While those consulted were not always unanimous in their views, the spirit of the consultations was constructive and forward-looking. The Congress Working Group took the comments of all of those consulted into account in their recommendations.

Several key themes emerged from the consultations, and were the focus of discussion at the full-day, face-to-face meeting of the Congress Working Group in August. These themes form the basis for the recommendations of the Working Group in this report.

The key themes identified by a majority of participants in the consultations were:

- Seeking a better balance in the amount of Congress programming;
- A growing interest in multidisciplinary programming;
• Increased emphasis on member services;
• A requirement for balance in Congress locations, coupled with a recognition that holding Congress in easily accessible locations is critical to financial stability;
• Sustainability, including the overall ability to sustain a large face-to-face national meeting in the humanities and social sciences, as the academic context worldwide changes; and
• Integrating and mainstreaming “reconciliation” and “Indigenization” as key priority areas across all of Congress’s current and future strategic plans.

A focus on members

As part of its discussions, the Congress Working Group believed it important to clarify the goals of Congress. It believed that framing the goals would allow the Federation to better work towards strategic improvements, and to measure results along the way. In developing these goals, the Working Group stressed that it sees Congress as one of a suite of member-focused activities carried out by the Federation. At most, only 10 per cent of humanities and social sciences scholars attend Congress annually. It will be important for the Federation to engage and serve all members, through a mix of events and services both inside and outside of Congress, over the coming years.

The Working Group defined Congress as:

• the premier gathering of Canadian humanities and social sciences scholars. In this, the convening power of the Federation in building community among humanities and social sciences faculty and graduate students was seen as paramount.

The purposes of Congress, in the view of the Working Group, are to:

• **Serve** the scholarly associations and universities that make up the membership of the Federation;

• **Contribute** toward building an innovative and sustainable community of humanities and social sciences scholars across Canada;

• **Serve** as a launch pad for new ideas;

• **Encourage** and provide a venue for networking among scholars;
• **Contribute to the development of the next generation of humanities and social sciences scholars** by affording graduate students an opportunity to network with senior scholars, identify mentors, and be exposed to cutting-edge ideas and knowledge in their fields;

• **Facilitate and support** the development of careers, both inside and outside academia, for faculty and graduate students in the humanities and social sciences;

• **Provide** a platform that brings together scholarly associations in the humanities and social sciences;

• **Raise the profile of the humanities and social sciences** in Canada, and to assist in showcasing the value of these disciplines to Canada’s economic, cultural and social well-being; and

• **Assist** in providing financial resources and stability for scholarly associations, universities and the Federation itself.

Importantly, the primary purpose of Congress is perceived to be service to members. The member-focused orientation of Congress and other Federation events and services is intentionally evident throughout the Working Group’s recommendations.

In clarifying the goals of Congress, the Working Group also sought to better identify the role of the Federation. To that end, the group noted that the Federation staff has particular expertise in meeting management and planning. It recommended that this expertise be more actively provided to both scholarly associations and host institutions in innovative and useful ways in future. The Working Group also believed that the role of the Federation as a clearinghouse of ideas should be strengthened in the years ahead.

The group stressed that it saw the role of the Federation as broader than Congress. Congress, it noted, while remaining a pre-eminent event in the Federation’s slate of activities, must be supplemented by an evolving set of services, events and activities supporting a variety of goals. In fact, this direction continues a path already set by the Board for the Federation through the 2016-20 strategic plan, with a strong focus on member services in the coming years.

The goals of Congress, and the identification of the roles of the Federation, served as an underpinning for the discussions of the Working Group, and the recommendations contained in this report. Throughout, the Working Group stressed the importance of “bottom up, not top down.” The group urged that a communications plan be developed to share and discuss the report with members, particularly with the leaders of scholarly associations, and that discussion of the future of Congress and other Federation events be seen as a long-term process.
The Congress Working Group recommends that the Board of Directors continue to keep the needs and views of members uppermost in mind. This report should not be viewed as an end product, but rather as the continuation of strategic discussions with the scholarly associations and universities that make up the Federation.

The Working Group also stressed the need for members – particularly scholarly associations – to become more involved in the planning stages of Congress programming, which would provide an opportunity to collaborate and share ideas.

The Federation’s annual conference was initially envisioned as a means to bring associations together. It was also originally intended to take place at smaller institutions, providing an opportunity for universities that are not in a position to hold a large event such as Congress. The conference provided a mix of presentations on topics of interest to humanities and social sciences scholars, updates on Federation activities, and sessions intended to be of value to associations. The 2016 annual conference, held at the University of Toronto, for example, included a Big Thinking lecture on sustainable cities; and workshops on the Federation’s submission to the federal government’s science and innovation reviews; the role of humanities and social sciences in reconciliation; and the community impact of humanities and social sciences scholarship.

Evaluations of the annual conference by participants were generally lukewarm. In March 2017, the Board of Directors decided to put the annual conference on hold, while re-evaluating the Federation’s activities.

Nonetheless, members of the Working Group and scholarly association leaders who took part in the consultation process spoke to the value of a face-to-face annual conference as one of the few venues where association leaders are able to gather and share ideas. It was suggested that rather than focusing on Federation-driven initiatives, a successful meeting of associations leaders could help to develop more engaging and collaborative programming for future Congresses. It could also provide a service to member associations by focusing on practical topics such as how to attract and retain members; guidelines for financial reporting; not-for-profit association governance, and developing and using social media effectively. The Working Group noted that in addition to in-person participation at such a meeting, the Federation should explore using communications technology to afford participants from smaller scholarly associations opportunities to participate in part, or all, of this meeting.
The Working Group saw value in re-thinking the annual conference and implementing such a member-focused event as a pilot project. Driven by members, this would provide another opportunity to bring members together and create value for them.

The Federation should develop an opportunity/opportunities for greater dialogue with members, particularly scholarly association leaders, and including both volunteer leaders and association staff. This event could take the form of a transformed annual conference, which would aim to share ideas and insights on programming, trends and initiatives, and encourage collaboration among associations. A pilot project could be launched at a central location, supplemented by the use of communications technology to allow for greater participation among scholarly association leaders.

The Working Group also turned its attention to improving the Annual General Meeting (AGM), typically now held on the first weekend of Congress. (The AGM had previously been held in concert with the fall annual conference.) In an effort to better engage members, the Federation added its Annual General Meeting to the Congress line-up, pairing it with a dinner for General Assembly Representatives of the scholarly associations and institutional members. While this was intended to encourage members to attend the AGM and to take part in the organization’s decision-making process, the AGM nonetheless tends to be a dry affair, and because scholarly associations’ meetings are spread over the week of Congress, a number of associations are unable to attend.

It should be noted that attracting members to an AGM is challenging for all non-profit organizations, and that a number are finding alternative ways to conduct such meetings, such as by teleconference or online. Generally, recent efforts to make AGMs more engaging and attract member interest have been failures for most not-for-profit organizations. Instead, the focus has turned to making AGMs more efficient and dealing quickly and efficiently with the necessary issues required by law, meanwhile moving member discussions and member engagement to other fora.

Members of the Working Group agreed that the Federation’s Annual General Meeting, as currently configured, was not an effective use of association and institution leaders’ time during Congress. Complicating the issue further is the fact that some associations continually have found it difficult to participate in the AGM. In particular, the Canadian Political Science Association, one of the Federation’s largest, typically meets in the latter part of Congress, and has been frustrated by its inability to tie participation in its scholarly meetings to the AGM, held earlier in the week.
The Executive Director of the Federation, Gabriel Miller, informed the Congress Working Group that efforts are already under way by staff to re-invigorate the Annual General Meeting. Instead of being held during Congress, staff are exploring whether the AGM could be held in another format, perhaps virtually or by teleconference. Furthermore, instead of holding the AGM during Congress, the Federation is exploring the concept of member roundtables at several points during Congress. These Federation roundtables would invite Congress participants to meet each other and Federation Board members and staff for open discussions on matters of interest. The Federation is looking at holding such open member roundtables several times during the week of Congress, to allow for maximum participation.

The Working Group welcomed Mr. Miller’s efforts to find new approaches for member engagement at Congress, and to find new formats for the AGM.

Finally, the Working Group strongly supported finding new ways to present the Canada Prizes, which are now held during Congress, and generally do not attract sufficient attention or participation. The Canada Prizes are awarded annually to the best scholarly books in the humanities and social sciences that have received funding from the Awards to Scholarly Publishing Program. The winning books are intended to make an exceptional contribution to scholarship, are engagingly written, and enrich the social, cultural and intellectual life of Canada.

Instead of presenting the Canada Prizes at a stand-alone event during Congress, the Working Group concurred with Mr. Miller’s proposal that the prizes be integrated into the programs of the scholarly associations from which the winners are drawn, thereby creating a more engaged audience for the event.

In addition, the Working Group turned its attention to member services related to Congress and other events that could be instituted by the Federation. Some of these initiatives are already being explored or developed by Federation staff. Potential member services identified include:

- A compendium of best practices for Congress for the use of scholarly associations;
- The development of guidelines as a resource for associations that are programming events;
- The development of guidelines for host universities that better set out expectations and best practices for universities hosting Congress;
- A fact sheet explaining how Congress fees are used by the Federation, host university and scholarly associations;
- An orientation to Congress for new Congress attendees, held on the Saturday prior to the opening of Congress;
• Developing a network of communications professionals who are embedded in university faculties of arts and social sciences as well as potentially joint communications strategies; and
• Greater efforts to bring together institutional and scholarly association members of the Federation to work in common cause, both for Congress and on other initiatives.

The Working Group concurs with staff plans to find a new approach to the Annual General Meeting (AGM), and to replace the formal AGM at Congress with roundtables that would allow members to share ideas and pose questions to the Federation and its leadership, held several times throughout the Congress period so as to allow maximum participation.

The Working Group concurs with plans to better highlight the Canada Prizes ceremony, with a pilot project of working with the scholarly associations from which the winners are drawn to integrate the awards ceremony in their programming.

The Working Group recommends that Federation staff continue to strengthen member services to support scholarly associations and institutions, including efforts to bring these groups together to work in common cause.
Congress programming

There has been significant growth in Congress programming in recent years, with scholarly associations, host universities, the Federation and partners mounting an increasing number of sessions.

In fact, a common issue raised by participants during the various consultations was the over-programming of Congress – and the concomitant inability for Congress participants to have serendipitous conversations or informal meetings. This means that “collisions” of people and ideas, simply do not happen. “It’s a nice idea in theory,” said one scholarly association leader. “But our agenda is so packed, we don’t even get a chance to take in other associations’ events.” Added another, “It’s important to provide a space at Congress where you can make connections and build networks. The best part of Congress is when you end up on a patio with someone and talk about common challenges.”

Despite the desire to make more room for such informal connections, there are pressures to increase, rather than decrease, programming. Scholarly associations depend on membership fees for financial sustainability, and for a number of associations, registrations for Congress programming are key to membership renewal and retention.

Additional and important priorities have driven the Federation to add programming in areas such as reconciliation with Indigenous peoples, and to provide time for partners such as SSHRC to inform and engage the humanities and social sciences community.

For host universities, holding Congress provides an opportunity to build profile and credibility among humanities and social sciences faculty and graduate students, as well as to enhance the institution’s profile and reputation within its local community and the Canadian higher education community as a whole. Events organized by the host university, which often include cultural programming or sessions showcasing the institution’s research excellence in specific areas, reflect these aspirations.

Host universities are also now providing special “pop-up” events such as concerts at Ryerson or the pianos placed around the University of Regina campus, encouraging Congress participants to mix in more informal settings. A Beer Tent/Social Zone has also been a successful component of most recent Congresses (with the exception of Ryerson in 2017, where more restaurant and bar choices were available near campus).
The pressure for host universities to develop programming is growing: it was noted by Working Group members that there is no clear template or direction for host universities, and so prospective hosts look to build on what previous host universities have done, and thus programming multiplies.

The Working Group also pointed out that some of the sense of over-programming of Congress stems from the fact that Congress has been significantly shortened over time. (In 1984, the Learned had reached a high point at the University of Guelph of 21 days. By 1999, Congress was reduced to eight days, and was reduced again to the current seven days in 2014 at Brock University.)

It should be noted that there was some discussion by the Working Group of the possibility of shortening Congress further to allow for greater collaboration among associations, but in the end this did not appear feasible. Working Group members have also suggested the possibility of lengthening Congress, with no additional programming being introduced but rather a greater opportunity for “contemplative pedagogy.”

The amount of Congress programming is also driven by the fact that faculty and graduate students depend largely on funding from their institutions or research grants to support travel to Congress. To receive this funding, they are normally required to demonstrate that they have made presentations at Congress. This leads to what was commonly viewed as a significant issue for Congress – where academics read lengthy papers, with few attendees present.

While respecting the need to actively participate in research dissemination through the presentation of scholarly papers at Congress, Working Group members suggested that scholarly associations and the Federation could work together to develop new approaches to scholarly communication to supplement academic presentations.

Already, some scholarly associations at Congress are experimenting with new formats. The Association of Canadian College and University Teachers of English (ACCUTE), for example, has introduced multiple formats for poster sessions, as well as sessions with short papers and pre-set questions.

A number of U.S. and international scholarly associations are also taking steps to provide alternatives to typical scholarly presentations. The Modern Language Association (MLA), for example, includes formal panels, roundtables, workshops and poster sessions in its offerings. At its 2019 convention, which is being held for the first time in conjunction with the American Historical Association, MLA will include working groups as a means for small groups of up to a dozen scholars to meet to discuss their work in multiple sessions throughout the convention. These groups will share papers and ideas online beforehand, and only brief presentations will be allowed, leaving ample time for discussion. The MLA working groups are also encouraged
to develop a collective project or outcome from their sessions. The convention will also include roundtables focusing on open discussions of broad scholarly or professional questions, rather than formal presentations, and emphasizing engagement among panelists and attendees, as well as career development workshops featuring hands-on learning for participants with a wide range of interests at various stages in their careers.

A common feature of efforts to introduce new formats is that they are designed to encourage conversation and dialogue, rather than more traditional academic presentations. “We have so much focus on one-way content delivery, and not enough on discussion and dialogue,” said one Congress consultation participant. “Just like our students – we don’t always want ‘the sage on the stage.’ We need the passion and excitement that comes from real conversation, and not just always passively listening to lectures.”

Others encouraged the Federation to support events where attendees could jointly produce a tangible product or outcome. Scholars could use their time together at Congress to produce a book or a special edition of a scholarly journal, or to jointly tackle a specific social issue or research problem in a “hackathon-style” event.

Through discussions with associations and institutions, the Federation should find ways to encourage sessions at Congress that are more interactive, featuring dialogue and discussion aimed at enhancing the participant experience. This could also include greater use of technology.

Another aspect of Congress programming that requires re-envisioning, in the view of the Working Group, are the Big Thinking lectures.

The concept of Big Thinking was introduced to Congress as a public-facing event highlighting “star” scholars in the humanities and social sciences. But too often, the Big Thinking lectures are not as well attended as they should be. They often conflict with sessions being organized by scholarly associations, and with meal times. Moreover, participants at Congress have expressed concern about the cost of bringing high profile speakers to the conference, believing that the funds could be better used in other ways to support Federation members. In addition, suggestions have been made frequently that Big Thinking lectures could have more impact if decoupled from Congress, and, for example, held throughout the year across Canada. It should be noted that Big Thinking is supported by sponsorships from partner organizations.

The Congress Working Group suggested that Big Thinking lectures would benefit from a number of innovations. They also extended their consideration of Big Thinking to those lectures that take place on Parliament Hill on a regular basis, attracting an audience of federal
government decision-makers and higher education partners and stakeholders. While *Big Thinking* on the Hill continues to be an important component of the Federation’s efforts to promote the humanities and social sciences in Ottawa, Working Group members recommended that these *Big Thinking* lectures be extended across Canada more frequently, potentially to provincial capitals. Profiling the value of humanities and social sciences research to provincial decision-makers – who are responsible for the operational funding of universities – could be a valuable service. (To do this, the Working Group suggested holding somewhat fewer lectures on the Hill, believing that the impact of the lectures would not be diminished.)

Meanwhile at Congress, the Working Group suggested that the Federation also consider reducing the number of *Big Thinking* lectures, and particularly no longer hold these during the lunch hour, when association events and informal opportunities for networking and eating take the attention of Congress attendees. Instead, the Working Group recommends that the Federation focus on a few high-profile scholars and hold *Big Thinking* lectures in the evenings, thereby increasing attention and potentially also encouraging community members to attend these important lectures. In addition, the Working Group welcomed a proposal by Mr. Miller to work with associations to sponsor open-access *Big Thinking* or high profile international speakers in conjunction and within association programming at Congress.

**7** Extend the *Big Thinking* lectures throughout the year by offering somewhat fewer on Parliament Hill, and, over time, planning a series of such lectures across the country.

**8** Develop a new approach to *Big Thinking* during Congress by placing greater emphasis on a small number of high-profile scholars/speakers and programming *Big Thinking* lectures during evening times when there are fewer competing events.
Multidisciplinary approaches

Throughout the consultations, participants expressed a clear and strong interest in increasing multidisciplinary programming at Congress. In this way, the comments of Congress participants, association leaders and stakeholders reflected the advice of the April 2017 report of the Expert Panel on Canada’s Fundamental Science Review (the Naylor report).

“World-leading research often crosses traditional knowledge and disciplinary boundaries, and is increasingly multidisciplinary in nature – both in its bridging of previously unconnected fields of knowledge and its development of entirely new disciplines,” the report stated. “Multidisciplinary research is prevalent in all research areas and is increasingly crossing traditional boundaries between the social, natural and health sciences and even between humanities and engineering – in other words, all the boundaries that currently demarcate Canada’s federal granting councils.”

The rise in multidisciplinary research creates challenges for Congress, which has historically been built on disciplinary lines, with a demarcation in particular between humanities and social sciences disciplines and the STEM (science, technology, engineering and mathematics) disciplines. As the Naylor report points out, this demarcation is swiftly becoming outdated, and acts as a barrier to the kind of collaboration among disciplines that is often at the cutting-edge of research today.

Disciplinary expertise and discussion remain important for Congress participants. Congress organizers were urged not to take an “either/or” approach to programming, but rather a “both/and.”

The need to focus on the scholarly work of individual associations was evident in the 2018 survey of Congress attendees. Sixty-eight per cent of attendees stated that “participating in my own scholarly association’s conference” was the most important factor in deciding whether to attend Congress. But more than one-third said that “my scholarly association should offer more flexibility and free time in the conference program schedule so that I can attend sessions outside my association’s program.”

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1 The Naylor report uses the term “multidisciplinary” for simplicity to cover “interdisciplinary” and “transdisciplinary” research. This report does the same.
Thus, while Congress must continue to serve the needs of scholars who wish to go “deeper” within their own disciplines rather than “wider,” it is clear that Congress needs to shift resources and programming in future to encourage greater multidisciplinary collaboration – including with scholars from outside the humanities and social sciences.

The view that Congress needs to more effectively support multidisciplinary discussions was strongly expressed by two institutions where SSHRC Leaders surveyed their academic colleagues to provide input on Congress. “It runs contrary to any encouragement of interdisciplinary work to have areas of shared interest running at conflicting times,” wrote Diana Coholic, Professor of Social Work and SSHRC Leader at Laurentian University.

Meanwhile Mary Bernard, Professor of Social Sciences in the College of Interdisciplinary Sciences at Royal Roads University, wrote that faculty members at Royal Roads wished to emphasize the critical importance of – and differences among – interdisciplinarity, multidisciplinarity and transdisciplinarity. Faculty members at Royal Roads recalled the words of British mathematician and philosopher Alfred North Whitehead, who wrote that “Modern science has imposed on humanity the necessity for wandering. . .The very benefit of wandering is that it is dangerous and needs skill to avert evils.”

Dr. Bernard concluded that “Congress fosters wandering, but within quite tightly defined academic domains. Perhaps we should be encouraging more wandering between siloes and for the productive conversations and research that can come out of those wandering. At the same time, we need to begin to provide those doing the wandering with the skills they may need.”

Many of the participants in the consultations agreed with the assessment that more “wandering” was what Congress needed to include in future if it wished to survive in the decades ahead. As one participant put it, “We have so many siloes at Congress. But the richness of discussion often comes when we make horizontal connections.”

During the consultations, Congress participants and association leaders suggested several potential initiatives that would lead to a more multidisciplinary approach to some aspects of Congress, ranging from having more joint sessions involving several scholarly associations; or taking a different approach to Congress fees such as a Congress “passport” or guest passes that would allow Congress participants to attend a set number of sessions of other associations. Many favoured a more cohesive approach that would gather scholars from different disciplines, including the local community, governments and the voluntary sector, to discuss challenging issues. These sessions could be held throughout the Congress week, or leading up to Congress at campuses across the country, and would be intended to encourage conversation across disciplines.
To begin, a number of participants suggested focusing some of the discussions throughout Congress on a broad range of issues centred around major themes that would be of interest to humanities and social sciences scholars and are central to Canada’s economy, society and cultures. While interest in such multidisciplinary approaches was more evident in social sciences rather than humanities scholars, it was not limited to a particular discipline or set of disciplines.

It was also suggested that more sessions include scholars from related disciplines in STEM areas – such as was the case in the fascinating Congress session in Regina 2018, sponsored by the Royal Society of Canada, which brought together an integrative biologist and a geographer/documentary film maker to discuss challenges and opportunities for digital transformation in Canada’s Arctic.

Many topics were suggested for such cross-cutting discussions. These included climate change; urban issues; diversity; the North and Canadian Arctic; the future of work and the skills required; social innovation; reconciliation; migration and refugees; and freedom of expression and academic freedom.

Among those consulted, a great deal of interest was expressed in bringing those from outside academia into such discussions. This was also seen as a way to respond to the needs of PhD and master’s graduates who may well work after graduation outside academia in governments, the private and public sectors, not-for-profits and think tanks. Discussions on such topics may also attract greater public interest, participants in the consultations noted, and could bring in members of the local community.

Partner groups, in particular SSHRC and Universities Canada, were particularly encouraging of this approach. A number of participants noted it would also support the Federation’s efforts to effectively demonstrate the value of the humanities and social sciences to Canadians.

The Congress Working Group concurred with the view that enhancing multidisciplinarity throughout Congress is necessary and inevitable. Among ideas explored by the Working Group were:

- Holding multidisciplinary conversations at universities across Canada throughout the academic year, culminating in a fuller discussion at Congress;
- Turning some of the *Big Thinking* lectures into panel discussions with speakers from multiple disciplines;
- Encouraging associations to work together to develop collaborative discussions on specific themes. For example, associations could be asked to identify the most
pressing issues among scholars within their associations, and joint panels or conversations could be set up at Congress to further explore these themes;

- Focus on a “story” each year, and encourage multidisciplinary approaches to that issue both throughout Congress and within associations;

- Consider how best to use the Federation’s interdisciplinary and international speaker funds to provide seed money to associations looking to experiment with new formats and approaches, including re-examining the application deadline for such funds to encourage greater collaboration among associations;

- Consider providing financial support to associations that undertake multidisciplinary programming;

- Identify champions within associations for innovative and multidisciplinary programming, and a staff person at the Federation to “champion” and support such initiatives;

- Explore the possibility of issuing an interdisciplinary publication (print or online) following Congress, perhaps also highlighting keynotes or Big Thinking lectures, to encourage further multidisciplinary efforts; and

- Use the fall planning meeting, which takes place at the host university in the year prior to Congress and includes local area coordinators from the scholarly associations, to encourage multidisciplinary efforts and joint programming.

The Working Group noted that holding an event to bring associations together on a regular basis would provide greater opportunities for such multidisciplinary discussions to emerge organically. They added that providing standard “black-out” times, when associations would agree that they would hold off on their own programming, would also allow for such multidisciplinary approaches to be tried. Finally, the group noted that there may not be a single approach to increasing multidisciplinary conversations throughout Congress and other Federation efforts.

In developing such new approaches to programming, Working Group members noted that increasing multidisciplinary content could be counterproductive if such programming were simply added on to Congress events. Already, as noted earlier, many participants to Congress consider the week to be over-programmed, and adding more multidisciplinary events will only serve to further burden participants. Additionally, the Working Group again emphasized the need to ensure any shift in programming be developed “bottom up” from the associations, rather than by directive from the Federation.
The Working Group recommends exploring the possibility of standardized black-out times during Congress, potentially over the lunch hour, to allow more time for collaborative sessions or networking. Another alternative would be to encourage that all programming in this time slot be open to all Congress attendees.

The Board of Directors should task staff with developing a plan, including proposing how financial resources could be utilized, for more effectively supporting multidisciplinarity, to be considered by the Board at an upcoming meeting and to be further discussed with members.

Congress location

While the future of Congress has been a longstanding concern for Boards of Directors of the Federation, the choice of Regina as the location for Congress 2018 sparked considerable discussion, particularly among some scholarly associations. The associations’ concerns were driven largely by financial considerations, as attendance at Congress is their primary method of attracting and retaining members.

The Board of one association chose to hold its conference in Montreal in 2018, outside Congress, as a way of engaging more of its members and involving a broader group of scholars in its meetings. The association expressed general concerns about barriers to participation at Congress, including what some of its members deemed the rising cost of Congress and Association fees, especially for graduate students, retirees and faculty with part-time or temporary employment.

While attendance at Congress 2018 was substantially lower than the all-time high of 10,000 academics at Congress 2017, Regina participants were highly positive about their experience. Those consulted during the Regina Congress attributed its success to a number of factors, including the welcoming nature of Regina staff, volunteers and the city as a whole; the ability to easily connect to other Congress participants; the Indigenous presence, both through University of Regina events and its federated First Nations University of Canada; and the graduate student travel awards offered by the university.
There were other key contextual factors at work in Regina as well, including: the presence and enthusiasm for Congress shown by the university’s President and senior leadership; a compact and self-contained campus that reinforced the sense of community and shared experience among attendees; and ideal conditions for socializing, including the return of the “Beer Tent/Social Zone” in a central, easy-to-find location combined with several days of warm, sunny weather.

Just as important, however, are the views of those who did not choose to attend Congress in Regina. Some pointed to the travel costs, the difficulty and time involved in travelling to Regina from most places in Canada, the sense that Congress had been held too often in recent years in Western Canada, and the cost of registration. Leaders for one association that did not attend in 2018 said they planned to return to Congress at UBC in 2019. They also noted the high workload for conference program chairs and their single association staffer. However, they left open the question of whether the association could again in future choose to withdraw from Congress, noting that their executive would watch the choice of future Congress locations carefully. It should be noted that some of the association’s members objected strongly to the decision to hold a standalone conference. A long-time member and stalwart Congress attendee said that her favourite Congresses were those at smaller institutions – Fredericton, Saskatoon and Winnipeg. “It shouldn’t just be the U15 and big rich universities that get to play host,” she noted.

The Federation Board currently has guidelines for choosing Congress hosts. Bids are sought four years in advance. In 2012, the Board approved the following Congress selection principles:

- Healthy and reasonably stable source of revenues for association members and for the Federation itself, including larger Congress revenues every two years in an accessible urban centre; and
- Congress locations reflecting, over time, the regional diversity of Canada.

However, the current requirements of universities that wish to indicate an interest in bidding are complex and can seem daunting for many institutions. Thus, the Federation Board can face limited choices for host institutions. This is especially driven by the size of Congress, which in its current format needs a minimum of 250 classrooms as well as special events spaces and on-campus housing; a minimum 25,000 sq. ft. space to host Expo and registration; and a city that can provide 13,000 to 15,000 room nights in hotels.

Finding a suitable host for Congress is also made more difficult by some associations’ perceptions of past difficulties in working with Federation staff, who at times were seen as inflexible in their approach and focused on the needs of event planners rather than those of member associations or institutions. The Board and senior management of the Federation are already addressing any such obstacles.
There were a number of suggestions that alternative approaches could be used in choosing future Congress locations. The President of the Association francophone pour le savoir (ACFAS) raised the possibility of joining with the Quebec-based annual scholarly conference to host a joint conference in future, possibly as early as May 2022. Others encouraged the use of conference or convention centres to complement university facilities. Joint bids from multiple universities in a region were also seen as a potential approach. It was clear as well that the staff will need to dedicate more time to outreach and marketing to potential hosts, and that the Board of the Federation and its members will need to play a more proactive role in encouraging host institutions in future.

The Congress Working Group carefully and thoroughly discussed the issue of choosing Congress locations. They weighed positive and negative aspects of holding Congress in smaller centres. It was evident that many participants who took part in Congress 2018 in Regina found it fulfilling and enjoyable, both from an academic and also from a networking perspective. The “collisions of people and ideas” were much easier to achieve on a smaller campus. However, the Working Group believed it had a duty to consider the financial sustainability of associations, many of which had significantly fewer participants in Regina than they had at Ryerson the year before. For the Federation, too, fewer participants can lead to budgeting difficulties, especially if smaller Congresses occur too frequently over a number of years.

In the end, the Congress Working Group recommends a re-thinking of Congress locations – from the selection process, the relationship between the Federation and the host university, the rotation of locations, to the venue itself.

To begin, the Working Group suggested that the selection process as it currently exists is not as effective as it could be. The practice of sending letters to each institutional member of the Federation and inviting bids can be misleading, as a number of the institutions that receive this letter are not in a position to provide the infrastructure on campus, hotel rooms required, and easy and cost-effective travel capacity, both locally through taxis and public transit, but also through multiple flights (and airline carriers) servicing the location. Instead, the Working Group recommends that the Board of Directors and Executive Director of the Federation play a more pro-active role in seeking out potential locations for Congress, rather than relying on a passive bid system that may not produce the desired results.

The Working Group also recommends changing the relationship between the university and Federation from “host university” to one of “partner university.” This shift in wording represents a significant change in how the relationship will be approached from both sides, with the institution and Federation working together rather than undertaking the sometimes difficult negotiations that currently take place prior to the signing of a Memorandum of Understanding between the two.
The host university model needs to be re-imagined, the Working Group concluded. The group emphasized that partner universities can include more than one university in a city or region, as well as sponsors from outside the region. Key aspects of the financial model — whereby the university provides financial and academic support while gaining revenues in areas such as food services, residence, and audio-visual and information technology services — will also need to be re-thought.

Thus, for example, a group of universities may wish to sponsor Congress. On occasion, Congress could be delivered largely at a convention centre, with some sessions held on nearby campuses to supplement the room availability in convention centres, to provide residence spaces particularly for graduate students, and to develop a sense of “campus” that many participants identified as important. The Working Group also recommended exploring the possibility of hosting a joint conference in future with ACFAS.

This shift in relationship will necessarily take time, the Working Group cautioned, but it has the potential to fundamentally change how Congress is delivered. Federation staff and institutional members will need to gain experience in building successful new partnerships and collaboration.

Finally, the group recommended that Canada’s large urban centres – Montreal, Toronto, and Vancouver and nearby cities – would necessarily be the location for many future Congresses. (In fact, the Working Group stressed the importance of returning to Montreal for Congress soon after 2021.) Proximity to major centres is important, not only to attract Canadian scholars and graduate students, but also to encourage more international participants who will enrich Congress discussions.

Nonetheless, the group did recognize as well the importance of choosing other cities as Congress locations from time to time. In doing so, it would be important to prepare scholarly associations for the financial impact of lower attendance, and provide them with support from the Federation to assist in cash flow planning and budgeting. The Working Group recommended that a long-range plan be developed and communicated to scholarly associations, with a cycle that would see smaller or medium-sized cities included every three to four years.

In the end, the group acknowledged that such a fundamental shift in Congress locations will be challenging, will take time, and must necessarily be discussed with association and institutional members of the Federation before being fully implemented. But as one Working Group member put it, “For the long-term survival of scholarly associations and the Federation, we have to look at major centres that will attract the most people.”
The Working Group recommends a fundamental shift in choosing Congress locations, including:

a. More proactive outreach by the Board and senior staff leadership of the Federation to identify locations and promote Congress among potential partners;

b. A shift in the tenor of the relationship from “host university” to “partner university/universities,” which is designed to create a clearer and more harmonious relationship between the institution and the Federation;

c. Developing a long-range plan for Congress locations, with a cycle that would see Congress locations focused in or near major urban centres, with plans every three to four years to locate Congress in smaller or mid-sized centres;

d. Supplementing campus locations with convention centres and other facilities such as hotels to provide greater flexibility; and

e. Implementing greater discussion between the Federation and scholarly associations about future Congress locations, well ahead of time, as well as the ability to provide some input into the choice of Congress locations.
Sustainability

As noted in the previous section, both the Federation and its scholarly association members depend on the financial success of Congress for their ongoing viability. Attracting participants to Congress is the fundamental business model of scholarly associations, most of which operate on an annual membership renewal basis. The Federation’s sustainability and ability to provide a slate of activities and member services also rests on the success of Congress.

Revenues from SSHRC provide significant funding for the Federation and for Congress in particular. It should be noted that the Regina location was seen as highly attractive by SSHRC senior staff, who welcomed an opportunity to make connections with an institution and academics outside the urban centres of Montreal, Toronto, Ottawa and Vancouver.

Whatever the location of future Congresses, the Working Group believes that associations need to enhance their membership recruitment and retention efforts in order to diversify revenues. At the very least, associations need to improve their cash flow planning so as not to face a financial crunch when attendance at Congress is lower than anticipated.

Some scholarly associations are exploring multi-year membership plans, which could lessen the dependence on a single Congress for financial sustainability. The Working Group suggests that the Federation could aid scholarly associations by providing workshops on financial and cash flow management; membership retention and attraction; or event planning advice to help associations become more sustainable.

ACFAS, which hosts a similar Quebec conference across disciplines, noted that it faces similar sustainability challenges when its meetings do not attract sufficient participants. Knowing this in advance, the Board of ACFAS plans ahead for potential deficits in smaller locations and less central regions of Quebec. Anticipating these deficits, the Board puts aside any surplus from larger conferences to fund meetings in regions outside Montreal and Quebec City.

A number of participants in the consultations recommended broadening participation in Congress to include government researchers and policy analysts and representatives from civil society groups. They suggested that higher fees be charged to such participants, who would be able to draw on more substantial budgets to attend Congress. Such participants would be especially useful in presenting a diversity of views, and in enhancing research dissemination outside traditional academic circles, in the multidisciplinary discussions envisioned in the previous section.
However, while some associations – and some sessions – may naturally include researchers and policy-makers from outside academia, this solution has limited applicability, in the view of the Working Group. Moreover, in defining the goal of Congress as being the premier gathering of Canadian humanities and social sciences scholars, the Working Group determined that attracting those from outside the academic sphere was secondary in purpose. Thus, this was not seen as a viable way to significantly enhance financial sustainability for the Federation or scholarly associations.

Nonetheless, the cost of Congress remains an issue for many. Registration fees are complex, consisting of both individual association fees and a fee to register for Congress as a whole. There are significant misperceptions about how Congress is funded. The Working Group stressed the importance of better communicating to members and Congress participants how the event is funded, and what revenues and costs are involved.

A number of participants in the consultations suggested opening more events to all attendees through the use of a Congress “passport”; agreements to share registrations among like-minded associations; or the provision of vouchers allowing Congress attendees to take part in a set number of sessions of other associations. The Working Group believes that more discussion among scholarly associations and the Federation is necessary to simplify and potentially amalgamate registration fees into a single fee. This is another area where the Federation will benefit from further discussion with ACFAS, an organization which gives conference attendees access to all conference events for a single registration fee.

It was also clear from comments made by those consulted that many did not understand the costs of organizing Congress. There were questions about what was covered by the Federation’s Congress registration fee, as well as relatively frequent comments about the perceived cost of *Big Thinking* and the sense that speaker fees for *Big Thinking* speakers were substantial. A number suggested that Federation staff could improve communications, especially to scholarly association leaders, on the costs (and benefits) of Congress participation.

For many participants, travel costs are seen as the most significant barrier to Congress attendance, not only for graduate students and post docs, but also for faculty in precarious academic positions. Some of those consulted suggested that the Federation urge future host universities to continue the travel grant program offered by the University of Regina for graduate students. Others suggested that, as part of the registration, faculty could be asked to make a voluntary contribution to cover travel costs for graduate students or the under-employed.

The importance of attracting senior scholars – especially scholars who have made major impacts – was also emphasized. Part of the attraction of Congress, participants noted, was networking with senior scholars. If Congress is seen as a venue largely for graduate students
to present papers to build their *curriculum vitae*, the allure of Congress was deemed to lessen. The Working Group suggested one approach to attract senior scholars could be a high-level workshop session (possibly with an additional registration cost) prior to Congress, with invitations to key scholars and a strong promotional plan to showcase their work. A number of these senior scholars could then go on to participate in sessions at Congress itself, and their presence on panels would further attract other participants to register.

Finally, a number of participants commented on the need for the Federation and its member scholarly associations to think more carefully about the environmental sustainability of Congress. The Environmental Studies Association of Canada, a member of the Federation, provided a post-event report and recommendations following Regina on “Climate Change and Academia: Addressing the Carbon Footprint of Scholarly Conferences.” It called for constructive dialogue on collectively reducing the carbon footprint of Congress, and provided a range of suggestions for doing so. These included greater ability for attendees to participate digitally with a reduced fee for digital participation; offering “rideshare” or other services for regional transport; and reducing dependence on disposable plates, cups, straws and cutlery.

Discussions on the environmental impacts of large-scale conferences will no doubt become increasingly important in the future, and it will be vital for the Federation and its members to be prepared and to begin efforts to reduce impacts where feasible.

**The Working Group recommends a slate of capacity-building initiatives related to financial sustainability for interested scholarly associations, including capacity-building sessions on issues such as multi-year member recruitment and retention; cash flow planning; and financial management generally as well as developing communications materials such as “key messages” that would allow associations to highlight the advantages of participating in Congress to their members.**

**Scholarly associations should be encouraged to adopt multi-year memberships to even out any financial gaps in years where attendance may be lower.**
14. The Federation should prepare an easily-understood fact sheet explaining the costs and revenues associated with Congress and communicate these facts more effectively to its membership.

15. Ongoing strategic discussions among associations should be convened by the Federation to further discuss greater collaboration and transparency in setting registration fees for Congress, including exploring the possibility of grouping fees from willing associations into a single fee that would allow cross-participation.

16. The Federation and its members are encouraged to develop plans to continue to attract and retain two significant groups of participants to Congress: senior scholars and graduate students. These could include the development of a promotional plan and special events for senior scholars, and greater efforts to include senior scholars as speakers. For graduate students, the Working Group recommends increased emphasis on mentoring to supplement or refresh the current Career Corner initiatives. One possible approach would be to hold a one-day meeting just prior to Congress that would link graduate students with senior scholars, and that would focus on careers both inside and outside academia.

17. The availability of child care at Congress, as well as programming to make Congress a “family-friendly event,” would be helpful in attracting new participants, in particular emerging scholars.

18. Over the longer term, the Federation and its members should engage in strategic discussions on the impact of academic conferences on the environment and climate change.
Indigenization and reconciliation

In spring 2015, the Federation Board adopted the *Touchstones of Hope Principles and Processes* to guide its commitment to advance reconciliation between Indigenous and non-Indigenous peoples. Working with the Board, Indigenous peoples and partners, the Federation stated that it would identify specific opportunities to put these principles into action throughout its programs.

The large majority of universities across the country are undertaking reconciliation training and incorporating Indigenous knowledges, contemporary issues and perspectives, histories and cultures into their curricula, research policies and practices, governance and campus spaces. Scholarly associations are making similar commitments to advance reconciliation, and this is reflected throughout Congress programming.

Congress 2018 at Regina was considered a high water mark for Indigenous and reconciliation-related programming. The theme, “Gathering diversities,” and the buffalo logo, demonstrated this commitment, as did the series of reconciliation events, lectures and workshops offered by the university and its federated First Nations University of Canada, SSHRC, scholarly associations, and the Federation itself. More than 40 events were featured as part of the reconciliation series, including the Canadian Society for Studies in Education’s pre-conference visits and treaty walk at Fort Qu’Appelle, site of the signing of Treaty 4 in 1874; a *Big Thinking* lecture by Marie Wilson, one of the Truth and Reconciliation commissioners; an introduction to powwow held at First Nations University; a concert by Buffy Sainte-Marie; discussions on strategies to recruit and retain Indigenous faculty; and a workshop on how disciplines engage in reconciliation. Evaluations of the 2018 Congress were highly positive about the focus on Indigenization.

The University of British Columbia has committed to a similar series of substantive events focused on reconciliation in 2019.

Both the Congress Working Group and the Federation’s Indigenous Advisory Circle examined how to enhance Indigenization and reconciliation efforts through Congress. Both groups focused on the importance of making Indigenization a more permanent and meaningful part of Congress. The Indigenous Advisory Circle, for example, recommended that the Federation integrate Indigenization and embed reconciliation at all stages in Congress, from the choice of location, through the early planning stages, to the events that take place at Congress.
The Indigenous Advisory Circle and the Working Group both emphasized the need to reach out to local Indigenous communities and involve them in the planning and delivery of Congress. The Working Group specifically recommended that Indigenous representatives always be part of the official opening of Congress, and that Congress sessions be provided to help academics better understand on whose traditional lands Congress is taking place. In that respect, the Working Group noted that a number of scholarly associations did not access Federation resources on how to recognize the traditional territory on which the University of Regina was located. It was recommended that this be clearly shared with all scholarly association leaders, and that associations should be encouraged to share the wording of such acknowledgements with panel chairs and speakers.

The Working Group also noted that a number of associations are particularly advanced in their reconciliation efforts, and recommended that the Federation gather promising practices from associations and act as a clearinghouse for ideas on how associations can enhance reconciliation efforts. For example, at Congress 2018, the Canadian Sociological Association provided funding to support attendance by Indigenous community members—a practice other scholarly associations may wish to adopt. Meanwhile, the Canadian Philosophical Association and the Canadian Society for the History and Philosophy of Science offered a workshop on “Science and Indigenous Ways of Knowing: Synergies or solitudes” and the Women and Gender Studies association mounted a session on “Indigenous women, food sovereignty, sustainability and climate change.”

In further sharing the work of associations and institutions on reconciliation, the Federation is encouraged to work with Universities Canada, which regularly surveys universities on their work in this area and hosts a programs and services directory on its website (https://www.universitystudy.ca/indigenous-programs-and-services-directory/). Another important partner for the Federation in this area is Indspire, a national Indigenous-led registered charity that invests in the education of Indigenous peoples through scholarships and advocacy (www.indspire.ca).

Moreover, the Working Group recommended that the Federation develop new supports for Indigenous students and scholars, helping to build capacity as well as to advocate for increased financial and other supports for Indigenous students and scholars. In particular, the Working Group recommends establishing a Federation fund to support Indigenous students who wish to attend Congress as well as funding to support increased Indigenous programming. The Working Group considers such efforts more effective than adding Federation-driven events to already full Congress programming.
The Working Group recommends a sustained, growing and meaningful emphasis on reconciliation and Indigenization at Congress and other Federation events.

This would include reaching out to local Indigenous communities early and involving them in the planning stages and programming of Congress; considering, through partnerships with local community leaders, how best to make a lasting and meaningful contribution to local Indigenous communities; developing a clearinghouse of best and promising practices among scholarly associations; and developing a new fund that would provide financial support to build capacity or programming and to support Congress attendance for Indigenous students.

Equity, diversity and inclusion

For universities and scholarly associations in Canada, as well as for the Federation, a commitment to advancing equity, diversity and inclusion (EDI) is already a reality. This is evident in the approach to programming, speaker choice and topics at Congress. More work, however, is necessary to ensure that the commitment to EDI becomes a reality throughout Congress programming.

Through its programs, events, and advocacy, the Federation actively promotes equity and diversity and creates forums for marginalized voices to be heard. Many of its recent efforts have supported reconciliation with Indigenous peoples, especially since the Truth and Reconciliation Commission issued its national calls to action in 2015.

At the same time, the Federation has taken steps to address obstacles faced by all racialized groups. Indeed, at Congress 2018, the Federation hosted an event featuring prominent Black scholars, including its former Board-member Malinda S. Smith of the University of Alberta, that looked at some of the major obstacles faced by racialized faculty and graduate students and highlighted specific changes universities need to make in order to address them.

University of Regina President Vianne Timmons also played a significant leadership role in advancing equity and diversity at Congress 2018. Dr. Timmons insisted that all *Big Thinking* speakers at the Regina Congress be women.
Many scholarly associations, too, are now taking steps to ensure that panels include scholars who are under-represented in academia. The recognition of the importance of EDI by leaders such as Dr. Timmons and by scholarly associations can pave the way for more action in future to include diverse thinkers and academics among speakers, panels, Congress organizers, and in leadership positions in scholarly associations.

In moving forward, the Federation will find strong proponents of equity, diversity and inclusion at potential Congress host universities across the country. In October 2017, Universities Canada members adopted a set of principles on equity, diversity and inclusion. In these principles, under-represented groups include those identified in the federal Employment Equity Act – women, visible minorities, Indigenous peoples, and persons with disabilities, as well as LGBTQ2+ people and men in female-dominated disciplines.

The members of Universities Canada have made explicit public commitments to seven principles, and university leaders pledged to being “active champions” of equity, diversity and inclusion on campuses, in communities and across the country. The EDI principles include a promise to take action by providing equity of access and opportunity, as well as by developing equity, diversity and inclusion action plans to underpin that progress on every campus. The public commitment of universities to EDI principles can also help to shape Congress programming and initiatives in the future as well.

**It is recommended that the Federation make an explicit commitment to equity, diversity and inclusion (EDI), and develop an action plan for Congress and other Federation events to ensure continued progress.**

**Internationalization**

Canada is a significant player in the internationalization of research, points out the 2017 report of the Advisory Panel on Federal Support for Fundamental Science (the Naylor report). The report adds that the primary driver of most international collaborations are researchers themselves, who seek out the colleagues, institutions, and facilities to complement their research, wherever they may be within the global research landscape.

It is perhaps no surprise, then, that the growing trend of international research collaboration is having an impact on Congress, and that this impact may well grow in future.
Increasingly, Canadian scholars in the humanities and social sciences are seeking international collaborators. A number of participants in the Regina consultations pointed to the importance of building international scholarly linkages. As one association leader put it, “Now, as a senior academic, I want much more international engagement. We also want more of our graduate students to be exposed to more senior academics. So bringing a more international face to Congress might be a win-win.”

Scholars in some disciplines say they are more connected to their American or international colleagues, rather than the Canadians that they are more likely to meet at Congress. Often, they say, it is less expensive to travel to conferences in the United States than to some points in Canada. In fact, in some disciplines, scholars say they are more likely to build links through the larger and better resourced American association, rather than within Canada.

There is also increasing interest from large American or international scholarly associations who are choosing to locate their conferences in Canada, often Toronto or Montreal. They are attracted by lower costs, proximity to large U.S. markets, and a perceived more open and inclusive political climate.

When large American organizations meet in Canada, scholars who are members of their counterpart Canadian associations may well choose to attend the international conference rather than Congress. The Canadian Anthropology Society has formalized this arrangement by signing a Memorandum of Understanding with its American counterpart, the 10,000-member American Anthropological Association. For leaders of the Canadian association, this MOU is seen as a question of survival, ensuring that the CAS does not lose members and revenue when the American association holds its conferences in Canada. Thus in 2019, the Canadian anthropologists will not attend Congress, but will rather meet at a joint conference with their American colleagues in November 2019 in Vancouver. The Canadian society will return to Congress at Western in 2020, and is considering whether to attend Congress in Canada in 2021. However, it anticipates in 2022 and 2023 that a joint Canada-U.S. conference will likely be held in Montreal, followed by Toronto.

It should be noted that not all participants who were consulted felt drawn to international conferences, nor did all welcome the presence of an increased number of international scholars at Congress. A number felt that the uniquely Canadian nature of Congress was one of its strengths. However, given worldwide research trends, it is likely that the pressures of international collaboration will inevitably lead to greater internationalization of Congress attendees, speakers and topics – and to increased competition from much larger American and international associations who choose conference locations in Canada.

The Working Group continues to believe that Congress should remain a uniquely Canadian event. Nonetheless, it urges the Federation and its members to develop a more concerted
strategic plan to attract international scholars. In the end, the members of the Working Group believe that, like multidisciplinarity, a greater focus on international collaboration is a significant and lasting attribute of research, particularly in Canada. The group also notes that, given the political climate in other countries including the United States, there may well be a growing interest in attending Congress and in collaborating with Canadian academics and graduate students.

Moving forward, the Working Group also believes that it is important to strengthen ties with international higher education and research-related groups. This could include regular participation of Federation staff, as determined appropriate and financially feasible by the Executive Director, in meetings of groups such as the American Council of Learned Societies (ACLS), the American Association for the Advancement of Science (AAAS), the American Education Research Association (AERA), and the Association of American Colleges and Universities (AAC&U, a significant advocate for liberal education in North America).

The Working Group also stressed the importance of reaching beyond North America, and building links around the globe. This could include, for example, officials from the European Union’s Horizon 2020 Research and Innovation Programme and the proposed Horizon Europe program that will succeed it and with the International Council for Science, the group with which the International Social Science Council (ISSC) merged this year. The ISSC previously held the World Social Science Forum meeting, the most recent of which was held in Japan, in September 2018; it is not clear whether this conference will continue in future.

The Federation should offer a clearinghouse service for scholarly associations wishing to internationalize their programming at Congress. This could include providing templates or information on initiatives undertaken by associations that have already significantly internationalized their participation and international outreach.

The Federation should develop linkages with major international scholarly organizations. This would include not only international associations that are meeting in Canada in conjunction with their Canadian counterparts, but also regular participation of Federation staff, as determined appropriate and financially feasible by the Executive Director, in meetings of international research and higher education-related groups.
Pilot projects and emerging issues

Throughout the consultations that fed into this report, and the discussions of the Working Group, a number of new initiatives were proposed. The Working Group discussed a number of those initiatives that appeared to hold significant promise, or that it believed would be of interest or value to a substantial group of Federation members. The group recommends that initiatives in these areas be further explored or developed as pilot projects to test their viability and practicality.

Some initiatives are already under way by Federation staff, and have been identified in this report. These include implementing new technologies to support Congress and membership requirements, changes to the Annual General Meeting, and to the Canada Prizes ceremony. Staff anticipate these will be introduced at Congress 2019 at The University of British Columbia.

However, given the need for member input and careful planning for pilot projects, the Working Group notes that not all initiatives can be undertaken at once. Moreover, with planning for Congress occurring months, even years, ahead of time, it may be some time before the full impact of any such pilot projects is evident throughout Congress.

Technology

Many participants in the consultations focused suggestions on enhancing technology. However, most participants agreed that a great deal of the value of Congress comes due to its face-to-face nature, which encourages exchanges and collaboration. While some noted that the use of technology (participation using Skype or other technologies) would broaden the audience for Congress, they feared losing the value of face-to-face dialogue, as well as potentially losing participants who might choose to join Congress virtually rather than in person. That said, several encouraged the use of technology for international scholars or for those who, for various reasons, cannot attend Congress. In addition, participants in the consultations noted that technology could be better used to amplify what happens at Congress. Nonetheless, participants agreed that technology was not yet at a point where it could replace or substantially change Congress.

In examining these views on technology, the Working Group was open to the idea of leveraging technology to allow for greater access. That said, it did not see virtual participation in Congress as replacing the face-to-face sessions – at least not yet. Instead, it suggested pilot projects that could enhance the Congress experience or encourage collaboration. These included the
creation of a Congress Commons or the use of Google Hangout by panelists to discuss presentations before attending Congress, and to encourage dialogue.

The possibility of supplementing Congress with an e-conference was also noted. Currently, the University of Alberta’s Kule Institute of Advanced Study provides a hybrid e-conference for graduate students. In 2018, the week-long Around the World 2018 online conference was held on the theme of "Sustainable Research: Modelling Nearly Carbon-Neutral Practices in the 21st Century." The conference is “an experiment that brings together a research dialogue without the environmental cost of traditional conferences.” The event is screened for live audiences at the University of Alberta and other partner institutes as well as live-streamed online around the world. Registration is free, and viewers are invited to take part in the online conversation and submit questions for guests who are attending the conference at the university. The Working Group suggested that further exploration of this model was warranted.

Finally, and almost without exception, Congress participants and partners such as SSHRC urged the Federation to implement a mobile app to allow easier navigation of Congress programming. The Working Group concurred strongly with these comments.

Further exploration of technology initiatives should be undertaken by Federation staff, with a plan to introduce some pilot projects in upcoming Congresses. In particular, and importantly, the Federation should move quickly to implement an app that would allow easier navigation of Congress programming.

Communications and research dissemination

Federation staff, under the leadership of the Executive Director and the Director of the new portfolio of Member Engagement and Communications, are in the process of re-thinking the strategic approaches the Federation takes to communications overall. Typically, communications during Congress takes the form of a focus on media relations and social media, primarily Twitter, and the Federation’s website. At present, Federation staff review Congress programs to identify cutting-edge or unique research to be highlighted for journalists.

Instead of this approach, the Working Group proposed that the Federation consider implementing a “brand journalism” approach to its Congress communications, which aims to tell stories and build affinity by attracting relevant audiences, rather than focusing on individual stories to be promoted to media.
Working Group members also pointed out that many universities now have specialized communications staff embedded within faculties of arts and social sciences, business and law schools, and other university areas where scholars in the humanities and social sciences are active. The development of a coordinated and cohesive approach by the Federation to these communicators – and the provision of support through the development of key messages and fact sheets – would help to support universities’ own communications efforts and build greater capacity for communications focusing on the value of the humanities and social sciences. The Federation may wish to partner in this effort with Universities Canada, which already hosts a regular meeting of university communications and government relations staff, as well as with the Canadian Council for the Advancement of Education (CCAE Canada), whose members work in the areas of advancement services, alumni relations, communications, marketing, fundraising, government relations, public relations and other advancement disciplines.

The Working Group also noted that stronger community engagement would provide a means to highlight Congress and to disseminate the work of scholars in the humanities and social sciences. There are currently a number of initiatives designed to attract the local community to campuses during Congress, especially including Big Thinking lectures, which are premised on the idea that community members would attend lectures by high profile scholars. But the Working Group noted that almost all of the efforts to date have been focused on inviting community members to campus, rather than reaching out beyond campus to the community. Instead of inviting participants from outside academia to campus, however, the Working Group proposed greater outreach and involvement in venues throughout the local community. Members of scholarly associations could offer to work with teachers and students in local schools to provide expertise or special events, for example. The Federation could link with community relations departments at universities to identify local challenges and issues, and could host discussions on these issues in public libraries or other community venues.

Themes such as urban development, public health, or the impact of emerging technologies could form the basis for lively interchanges among scholars, not-for-profit groups, local, provincial and federal governments, university alumni, and interested members of the local community. The Federation’s partners and stakeholders, including Universities Canada and SSHRC, as well as its university members, could well be interested in further discussion on such initiatives.

The Working Group also encouraged ongoing discussion on new forms of research dissemination and knowledge mobilization. In particular, the Federation has begun discussions with SSHRC and several researchers who are using documentary film to disseminate their scholarly work more broadly. An open event at Congress 2018, entitled “Social sciences and...
humanities research on film” attracted a significant audience. SSHRC is looking at supporting documentary filmmaking not only to disseminate research, but also to train graduate students in new forms of scholarly communications.

The Working Group discussed the role of Expo, and particularly the role of book publishers, during Congress. A number of participants had commented on the value of Expo. Others noted the critical importance of books to research dissemination in the humanities and social sciences, and urged that publishers continue to be given pre-eminent space and highlighted during Congress.

In fact, the Working Group believed that more can be done to make Expo a lively, interactive space with a particular focus on celebrating the book (both in print and digital form). It is recommended that the event space attached to Expo be made more central and visible, and that events not take place in a separate area.

The group encouraged greater use of book launches at Expo, as well as readings held in the Expo space of newly-released books. Interviews with authors could also be a draw to the Expo space. Participants suggested using experienced interviewers, such as broadcasters Shelagh Rogers or Paul Kennedy, to celebrate the role of books and create interest in compelling academic writing.

The Working Group encourages Federation staff to continue developing a new approach to communications, both externally and to the membership.

The Working Group recommends exploring new ways to reach out to local communities during Congress and other Federation events – and to demonstrate the value of community-engaged scholarship. This could add value to local communities, universities, and the scholars that are represented in the membership of the Federation.

The Working Group encourages further exploration of documentary films to mobilize and share research, as well as an overall openness to highlighting and experimenting with new forms of scholarly work at Congress and other Federation events.
The Working Group recommends that the Federation place greater emphasis on celebrating the role of books in the humanities and social sciences. The Working Group also encourages the Federation and its members to make more efforts to ensure that Expo is a lively and interactive space, which in turn could draw greater participation among Congress participants and exhibitors.

Moving forward

As the Board and membership of the Federation consider this report, the Congress Working Group wishes to encourage all to take on the same challenges it was given: think creatively, long-term and with openness to new ideas.

The recommendations contained in this report are offered in the spirit of ongoing consultation. The Working Group stressed throughout its deliberations that member engagement and input are important next steps in the process of re-imagining Congress.

Working Group members recognize that change is not easy, and that it will take time. Moreover, financial and human resources available to the Federation, and the scholarly associations and universities that make up its membership, will by necessity influence the timing and extent of implementation of the Working Group’s recommendations.

Thus, the Working Group encourages the Federation to think long-term about transformation, and not to expect immediate success. As one member of the Working Group put it, “The changes may fail for three or four years in a row. But if it is worth pursuing, it will happen.”

In that vein, the Working Group offers its final recommendation:

The process of transforming Congress may well be as important as the transformation itself. Engagement, imagination, collaboration and good will on all sides are critical. So, too, is the willingness to take some risks. The Working Group encourages further discussion on its recommendations, and a long-term approach to continuing to build the premier event for humanities and social sciences scholars in Canada.
Appendix A: 
Terms of Reference for the Ad hoc Working Group on the Congress of the Humanities and Social Sciences

Status

1.1 The Federation for the Humanities and Social Sciences Ad Hoc Working Group on the Congress of the Humanities and Social Sciences is a special committee established by the Federation’s Board of Directors to provide advice to the Executive Director and Board of Directors on how best to meet the Federation’s strategic directions and objectives through Congress and other events.

1.2 Objectives and directions for Congress were set in the 2016-20 strategic plan. The Board of Directors of the Federation identified at its October 2017 meeting the need to frame a thorough strategic Board discussion on the future directions of Congress.

1.3 Discussions by the Working Group will take into account the full range of events organized by the Federation, as a suite of activities.

1.4 Establishment of the Working Group was approved by the Board of Directors at its meeting in December 12, 2017.

1.5 The initial term for the group is December 12, 2017 to December 2018.

1.6 The term can be renewed as required and approved by the Board of Directors.

Mandate

1.1 Provide advice and perspective to help frame strategic discussions by the Federation Board on how best to position Congress and other Federation events so as to allow the organization to achieve its mission and vision.

1.2 Taking direction from the Board of Directors’ March 2018 discussion:

1.2.1 Evaluate the strategic directions and objectives for Congress as set out in the 2016-20 strategic plan, and recommend any revisions to these strategic objectives for Board approval.
1.2.2. Evaluate risks and emerging opportunities related to Congress and other Federation events, and scholarly associations and institutions.

1.2.3. Review progress on integrating Indigenous perspectives and value during Congress and other Federation events.

1.3. Provide a progress report on activities to the Board for its May 27, 2017 meeting.

1.4. Develop goals, objectives and a work plan intended to strengthen Congress and other events, for recommendation to the Board at its October 12, 2018 meeting.

1.5. The activities of the Working Group will be informed by:

   1.5.1. An evaluation of members’ satisfaction with Congress from multiple perspectives, including the leadership of scholarly associations, the leadership of institutions, members of associations, faculty members, Board members and host universities for Congress.

   1.5.2. An evaluation of the drivers for Congress participation.

   1.5.3. An evaluation of the drivers for institutions bidding to host Congress.

   1.5.4. An evaluation of the drivers for Congress financial sustainability.

   1.5.5. Consultations with participants in Regina at Congress 2018 and subsequently with stakeholders.

**Membership**

1.1. Members of the group are appointed by the Executive Committee of the Federation and are made up of a representative and a balanced group of membership associations and institutions, as well as Board members.

1.2. The group will consist of up to six members. The Chair of the Group will be appointed by the Executive Committee.

1.3. The Acting Director of Congress and Events will serve as secretary to the group.

1.4. The Executive Director may engage consulting services to provide strategic advice to the group or to facilitate its work.
Meetings

1.1. The group will meet by telephone conference or other electronic means that permit each member to communicate adequately with each other.

1.2. Occasional meetings may be held in conjunction with other Federation meetings or events.

1.3. The meetings shall be conducted in either English or French. No simultaneous interpretation will be provided for meetings.

Approved by the Board of Directors, December 12, 2017.

Amendments approved by the Executive Committee, February 2, 2018.

The Working Group acknowledges the many discussions and conversations it has had with colleagues, students and participants at Congress over the past months.