

BSIA Technology Governance Initiative: A Proposed 5-year Resource Strategy

In May 2023, the BSIA's evolved 5-year Strategic Plan was endorsed by both the BSIA Council and the BSIA Board. The key pillars of the plan are:

- Provide value to our students by innovating the BSIA student experience and providing more opportunities for in-person interaction;
- Draw current community members back, and attract new scholars and practitioners to our building;
- Provide heightened value to our partners.

In short, this means:

- *Attracting star scholars;*
- *Embracing technology in the delivery of international affairs;*
- *Innovating and internationalizing the BSIA student experience.*

If the School is to pursue a strategy of excellence through differentiation based on the technology and innovation pedigree of the Waterloo institutions – and the prominence that it could gain in the much sought-after domain of “Technology Governance” – the School must occupy this strategic position prominently, authoritatively and immediately. We believe that a window of opportunity currently exists to project the School as a leader in this field – at the apex of technology and policy – and that the BSIA could become a global leader in international affairs by taking a technology-embracing approach to this critically important domain. As such, the BSIA's Technology Governance Initiative will become a significant aspect of the BSIA's evolved 5-year Strategic Plan; a plan which prioritizes a student-centred approach and heightened value to the BSIA's collaborative partners.

The three above-mentioned goals are all underpinned by critical enabling objectives, some of which require a significant investment to execute effectively. The objectives also include strategies for the leveraging of further funding.

The Balsillie Scholar Program

- This program will attract top international scholars/practitioners in the area of technology governance, particularly as this relates to BSIA's six research clusters. Our goal will be to start with a few renowned international scholars and technology leaders in year one, but eventually grow to a steady state of approximately three scholars residing at the BSIA for 12 months each; three scholars residing at the BSIA for six months each; and four scholars residing at the BSIA for three months each. These leading scholars will produce Balsillie Papers and Case Studies, support BSIA-CIGI research priorities and engage with, and mentor, students. A full-time Balsillie Scholars Program Coordinator will be recruited to support the administrative team managing this program. Anticipated costs include living, travel and incidental costs for the scholars. The School will also encourage “matching” funds, which scholars could generate from other research grant facilities such as McArthur Foundation, the British Academy, Fulbright, etc. Advertising for the program will commence in October to consider initial applicants for a January 2024 start date. Discussions will also take place with BSIA scholars and collaborative partners to identify

individuals whom we would encourage applications from. A committee comprising representatives from all partner institutions will be created to consider applicants to the program on a quarterly basis. Meetings will be held with both universities to discuss the most effective way to support library access and departmental affiliations for the visiting scholars.

Student Development Initiatives in Technology Governance

- **Technology Governance Summer School**
 - This program will run in August of each year across two weeks and provide students with exposure to technology scientists and technology policy and governance experts in fields such as data science, energy security, data governance, data standards/ethics, health informatics, responsible AI, cyber resilience, migration science, climate change, etc. The course will provide students with exposure to the domain vernacular, knowledge, and skillsets. The course will include one piece of formative assessment. Each student will be awarded with a meaningful certificate of participation. Two PhD students will be recruited to support the program planning and execution.
 - Bringing global experts to Waterloo to support the summer school may also help stimulate the interest these scholars may have in returning to Waterloo in the form of a Balsillie Scholar.
- **Technology Governance Internship Support**
 - With new relationships being forged across the international policy community on matters concerning technology governance, opportunities will be supported for paid student internships. This funding will support up to 6 four-month fully BSIA-paid internships and/or, based on a “matching” strategy (through organizations such as MITACS, and the host institutions themselves), help subsidize partial internships.
- **Technology Governance Annual Student Symposium**
 - The BSIA currently enjoys a strong relationship with its international partner institutions, such as Warwick University, the American University, and Konstanz University. During the past three years, the BSIA organized a number of successful PhD student symposia, all of which enjoyed positive feedback. This funding will support one annual PhD symposium focused on technology governance. The event would feature PhD students from partner institutions travelling to Waterloo for a two-day symposium. Mentors would also participate in the proceedings, both on an in-person and virtual basis. A PhD student will be hired to support the planning and execution of the symposium.

Technology Governance Initiative’s annual “Balsillie Survey”

- The publication of an annual “Balsillie Survey”, which will present data and analysis reflecting technology governance and policy-related feedback from 50 of Canada’s top technology leaders. The survey will be run by a TG Program Coordinator and supported by student researchers following the annual publication of the government mandate letters and the federal budget announcements. It will provide important empirical data and analyses for both the policy and research communities.
- The initiative will be launched in September with a working dinner, which gathers a group of Canadian technology leaders and Waterloo-based faculty members to discuss issues concerning approach, research design and methodology supporting the annual

survey. BSIA students will be given the opportunity to provide research assistance and make a meaningful contribution to the annual publication.

Balsillie Case Studies

- The development of Balsillie case studies will provide 1) a reputable platform to profile technology governance thought leadership in Waterloo and 2) a teaching tool for faculty to use in the BSIA’s international affairs classrooms. These case studies could be used by both public policy and international affairs schools, and business schools.
- Each year, we will offer the Ivey School Case Study Development Training Course to interested faculty and students. We will then support the development of up to 10 case studies per annum. This initiative will provide research opportunities for our students to support case study Principals (lead authors); and, where required, travel grants to support fieldwork.
- Published case studies will be subject to proposals being submitted to the Balsillie Papers editorial team in response to an internal call to faculty. Coordination of case studies will be led by a Technology Governance Program Coordinator who will be responsible for coordinating both the case study and the Balsillie Survey.

Proposed schedule of annual donations

	Estimated spending	Proposed donation	Date
Year 1	\$ 769,750	\$800,000	September 28, 2023
Year 2	\$ 1,026,095	\$1,000,000	September 1, 2024
Year 3	\$ 1,052,353	\$1,050,000	September 1, 2025
Year 4	\$ 1,063,080	\$1,050,000	September 1, 2026
Year 5	\$ 1,074,033	\$1,100,000	September 1, 2027

Launch of the BSIA’s Technology Governance Initiative

The launch of the BSIA’s Technology Governance Initiative will take place on **September 28, 2023** at the BSIA. Invited guests will include students, staff, faculty, fellows, BSIA Board members, CIGI colleagues, technology faculty colleagues and members of the senior administration of both universities, media, a number of Canadian technology leaders, and the BSIA’s generous founder and funder, Mr. Jim Balsillie. The event will begin at 1:00 pm with a reception featuring a welcome address from the BSIA Board Chair (Jeff Casello), an address by our eminent guest, Mr. Jim Balsillie, and some concluding remarks by the BSIA Director. The event will provide an opportunity to project the School’s vision and intentions, as well as bring media attention across Canada and internationally of the School’s differentiated pursuit of excellence in technology governance. The event will provide the opportunity for students to meet and interact with Mr. Balsillie, university leaders, CIGI colleagues and technology leaders.

BSIA Scholars Program	
Monthly stipend for all Scholars	
Housing	\$ 5,000
Food and incidentals	\$ 2,000
Total	\$ 7,000
One-time costs	
Travel subsidy for all Scholars	\$ 2,000
Research travel allowance for Scholars <6 months	\$ 2,500
Visa costs (paid direct by BSIA)	\$ 250
UHIP costs (paid direct by BSIA)	
3 months	\$ 500
6 months	\$ 1,000
12 months	\$ 1,500
Library access	n/a
Annual program support costs	
Balsillie Scholars Program Coordinator - salary, benefits and taxes - indexed	\$ 73,000

Cost per Scholar based on length of term	
3-month	\$ 23,750
6-month	\$ 47,750
12-month	\$ 90,250

Program based on 10 Scholars after Year 1

Year 1 - 2024	
Six 3-month Scholars	\$ 142,500
Three 6-month Scholars	\$ 143,250
BS Program Coordinator	\$ 73,000
Year 1 Total	\$ 358,750

Year 2 - 2025	
Four 3-month Scholars	\$ 95,000
Three 6-month Scholars	\$ 143,250
Three 12-month Scholars	\$ 270,750
BS Program Coordinator	\$ 76,000
Year 2 Total	\$ 585,000

Year 3 - 2026	
Four 3-month Scholars	\$ 95,000
Three 6-month Scholars	\$ 143,250
Three 12-month Scholars	\$ 270,750
BS Program Coordinator	\$ 79,000
Year 3 Total	\$ 588,000

Year 4 - 2027	
Four 3-month Scholars	\$ 95,000
Three 6-month Scholars	\$ 143,250
Three 12-month Scholars	\$ 270,750
BS Program Coordinator	\$ 82,000
Year 4 Total	\$ 591,000

Year 5 - 2028	
Four 3-month Scholars	\$ 95,000
Three 6-month Scholars	\$ 143,250
Three 12-month Scholars	\$ 270,750
BS Program Coordinator	\$ 85,000
Year 5 Total	\$ 594,000

Total Program Cost \$ 2,716,750

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Student Development Initiatives

Technology Governance Summer School		
People		
BEI (partial salary)	\$ 30,000.00	AFG to lead, and BEI Admin Asst to assist
Guest speaker stipends	\$ 15,000.00	First year included \$6K for stipends for one week program
Travel costs for some guest speakers	\$ 8,000.00	Estimate only
PhD support (2)	\$ 3,000.00	To coordinate the daily logistics
Food		
Lunches	\$ 3,000.00	\$300 x 10 days
Breaks	\$ 1,000.00	\$100 x 10 days
Annual Total	\$ 60,000.00	

All program costs indexed at 3% per year

Year 2	\$ 61,800.00
Year 3	\$ 63,654.00
Year 4	\$ 65,563.62
Year 5	\$ 67,530.53

Technology Governance Internship support		
Six internship positions	\$ 84,000.00	\$25/hour x 35 hours x 4 months x 6 positions
Annual Total	\$ 84,000.00	

Annual Student Technology Symposium		
Annual symposium	\$ 40,000.00	Includes travel, refreshments and conference support
Annual Total	\$ 40,000.00	

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Technology Governance Survey Project	
Annual program costs	
Technology Governance Program Coordinator - salary, benefits and taxes	\$ 90,000.00
Travel budget for TG Program Manager	\$ 15,000.00
Research support costs (based on 5 students/10 hours per week/\$30 per hour/10 months)	\$ 61,500.00
Survey editing, layout and publication	\$ 10,000.00
Annual Total	\$ 176,500.00

All program costs indexed at 3% per year

Year 2	\$ 181,795.00
Year 3	\$ 187,248.85
Year 4	\$ 192,866.32
Year 5	\$ 198,652.30

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Case Studies Program	
Annual training course offered by Ivey - indexed	\$ 4,500
Website development fees - one time	\$ 2,500
Marketing and admin fees - divided among the years	\$ 30,000
Case study fees	
Principal	\$ 1,500
Supporting Research	\$ 1,500
Editing	\$ 1,000
Travel support for field research	\$ 1,000
Layout and design	\$ 250
Total cost per case study	\$ 5,250

Year 1 - 2024	
Ivey course	n/a
Website development	\$ 2,500
Eight case studies	\$ 42,000
Marketing and admin fees	\$ 6,000
Year 1 Total	\$ 50,500

*completed in 2023

Year 2 - 2025	
Ivey course	\$ 4,500
12 case studies	\$ 63,000
Marketing and admin fees	\$ 6,000
Year 2 Total	\$ 73,500

Year 3 - 2026	
Ivey course	\$ 4,700
15 case studies	\$ 78,750
Marketing and admin fees	\$ 6,000
Year 3 Total	\$ 89,450

Year 4 - 2027	
Ivey course	\$ 4,900
15 case studies	\$ 78,750
Marketing and admin fees	\$ 6,000
Year 4 Total	\$ 89,650

Year 5 - 2028	
Ivey course	\$ 5,100
15 case studies	\$ 78,750
Marketing and admin fees	\$ 6,000
Year 5 Total	\$ 89,850

Total cost for the program \$ 392,950

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