Social Innovation Generation

Fostering a Canadian Ecosystem for Systems Change

Geraldine Cahill & Kelsey Spitz
Foreword by David Johnston,
Governor General of Canada

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For Brenda
Thank you for illuminating the paths we walk.
In a complex world, you are our guide.

For Katharine
You uncovered critical insights from McConnell's
collaborations with its many partners and contributed
to and nurtured the systems thinking that led directly
to SiG's creation.

Foreword

By David Johnston, Governor General of Canada

One of the great privileges of serving as governor general comes in having the chance to shine a spotlight on important issues facing our country. Innovation is one such issue, with social innovation being a particularly important outlet for our creativity and well-being. While the envy of the world in many respects, Canada faces significant social, environmental and financial challenges. Such challenges — for example, poverty and homelessness, youth unemployment, demographic change and the marginalization of certain populations — require creative thinking and collaboration due to their complex, multi-layered nature. They call for social innovations that explore new approaches to building resilience, fostering inclusion and enhancing sustainability.

The good news is Canada is home to an increasingly dynamic culture of innovation and a growing number of individuals and organizations that are working together to innovate socially. The Social Innovation Generation partnership is a prime example. In bringing together a range of partners, including MaRS, the University of Waterloo, Plan Institute and the McConnell Foundation, as well as many individual innovators, this partnership has inspired important thinking and dialogue on social innovation in Canada, as well as significant action. The story of this unique initiative is well told within these pages and can serve to inform, guide and inspire many others who are likewise seeking to change their communities, this country and indeed the world for the better. I thank and congratulate all who were involved in both the writing and making of this history.

Acknowledgments

There is no one SiG story.

As in life, perspective, experience and memory colour our recollections over the years and we have done our best to present a narrative kaleidoscope here in such a way that as many people as possible see themselves reflected in it. To bring this book to life, we interviewed SiG principals, partners, collaborators and both current and former staff. We drew on publications and thought leadership from both inside and outside the partnership. We are deeply grateful to all who interviewed for the book and all who inspired this story.

We are especially grateful for the trust the partners placed in our ability to tell this story. You are more than wise travellers; you have made it possible for us to more deeply understand the characteristics of a rich social innovation ecosystem and reflect rich learnings out through this capstone document.

The seeds of the SiG dandelion have blown far and wide, but our roots have been nourished by the generosity, passion and leadership of many, from the staff at each SiG node, to the principals themselves, to collaborators across Canada and the globe. To each of these incredible individuals, thank you. For your time, teachings, fierce commitment, and continued impact on social innovation in Canada, we are eternally grateful.

— Geraldine Cahill & Kelsey Spitz

Preface

By Stephen Huddart, president and CEO of the McConnell Foundation

On June 8, 2017 the federal government established a 17-person steering committee to co-create a social innovation and social finance strategy for Canada — yet another indication that social innovation and social finance are coming of age.

As this book demonstrates, a social innovation movement, with its associated tools and mindsets, has been spreading across civil society, business and finance, academia and the public sector for more than a decade. It is "social" because it addresses society in general, specific challenges, and each of us in particular. It is bringing about new cross-sector partnerships and improving outcomes for vulnerable individuals and communities. It is contributing to Indigenous reconciliation, enlivening our cities, creating jobs in the social economy, and accelerating social R&D. It is building a marketplace of ideas and outcomes from social systems change. It is connecting Canada to innovation leadership around the world.

To a considerable degree, Social Innovation Generation (SiG) and those whose work is described in this volume are responsible for these developments. However, they are the first to point out that it is more accurate to speak about shared contribution and changing contexts than to claim credit. It might be more appropriate to say that SiG has helped to create the conditions in which social innovation is flourishing. From this perspective, SiG's work is largely done and the story it has to share here is both a useful record and a prelude to what must follow.

For the McConnell Foundation, SiG has served as a "secondary operating system" — a way to develop and apply tools such as social innovation labs and solutions finance in our work and to share them with others. We created a Social Innovation Fund to support different stages of innovation. We began going on more learning journeys with grantees, partners and board members. New initiatives such as Cities for People, Winnipeg Boldness and WellAhead introduced the subsidiarity principle: decentralizing decision-making to the smallest or most local competent authority. As the Nisga'a told us after introducing a new, culturally appropriate child wellness program: "Thank you for letting us take the time to do this well".

> THE NISGA'A NATION IS IN NORTHWESTERN BRITISH COLUMBIA

Today, social innovation and social finance enable McConnell to align its resources with an exponentially growing number of philanthropic peers and diverse partners — in effect, creating human ecosystems working on systemic change.

It is now open to all sectors of society to apply social innovation at scale and turn wicked problems into opportunities for inclusive growth. Whether it's climate change mitigation, Indigenous reconciliation, or improved outcomes from social services, our urgent opportunity is to integrate social innovation with technological, scientific and economic innovation. Aligning efforts this way increases the likelihood that we will meet the UN Sustainable Development Goals, which cannot be achieved by any one sector on its own. In doing so, we can co-create better outcomes for Canadians and, hopefully, an example for the world.

Contents

FLOURISH

RELEASE

Introduction

**Nothing is permanent in this wicked world —
not even our troubles. —Charlie Chaplin**

Our story began in a theatre. On the stage, high school students brought their characters viscerally to life, transforming themselves quite beyond the control of their college student director, Frances Westley.

"They took the play we were working on to a place where I couldn't have taken it myself," Westley recalls.[1] "My job became to help them find experiences in their own life which were like the characters; then they could illuminate this and bring it to life in ways that were really transformative. I realized that you can set up certain conditions for transformation, but the transformation itself has a kind of ineffable quality; it is emergent and you can't make it happen."

That realization informed Westley's career as she moved from sociology to innovation and systems thinking to whole systems approaches to social innovation. Her interest in the conditions for transformation ultimately brought her to a bigger stage — the interconnecting and intractable problems emerging worldwide and the conditions for positive transformation to counteract them. She moved from the role of director to actor, joining a partnership of committed players seeking that ineffable emergent quality of transformation.

This is the story of that partnership's attempt to nurture the conditions for transformative change in Canada, in the face of the growing urgency and complexity of our social and ecological challenges. We called this kind of transformative change, which targets the root causes of an entrenched complex problem, social innovation.

The partnership, Social Innovation Generation (SiG), was founded in 2007 with a mission to create a culture of continuous social innovation in Canada. It was born to serve the people changing the very way society works — the people who live on the edge of stuck systems, locked in place by the norms, politics and ideas of previous eras; who bring together human ingenuity, passion and compassion to respond to these failing systems; and for whom necessity is mother of invention and care is the other parent.

Theatre for Living's David Diamond leads SIX participants through a nemesis exercise (Photo by Komal Minhas)

In this book, we lay bare what our mission meant to us, why it matters, what we learned, where we stumbled and our insights into how social innovation happens. This is our way of paying forward our learning and insights, cultivated in collaboration with dozens of generous partners over the years.

As Tim Brodhead, former president of the McConnell Foundation, reflects later in this book, "SiG's uniqueness lay in its cross-sector composition — engaging and learning from the private sector, government, academic and community-level understandings of innovation — and in its ambition to create an ecosystem of support for social innovation: new financial models, mindsets, policies and institutional arrangements." While we hope you find the whole book interesting, we designed the chapters to stand alone. There are distinct sections on our approaches to capacity-building, networks and convening. We share our experience helping Canadians work towards social and ecological change in new ways, supporting the development of nascent fields, such as social finance and social enterprise. We reflect on the shadows in our work and the challenges we experienced.

Included throughout the book are reflections from the SiG principals and Indigenous innovation leaders that serve to highlight key opportunities today and discrete milestone events or approaches.

For 10 years, SiG celebrated social innovators and social entrepreneurs around the world, working to highlight the creativity and determination of non-profits and businesses that are devoted to transformation. In time, we learned to serve these innovators and create the conditions for more of them to succeed with their system changing projects, platforms, initiatives and collaborations.

We endeavored to include in our story as many of the people and events that defined our journey as we could in a limited space. The stories that follow are illustrative but not comprehensive and we extend our gratitude to all who journeyed with us.

As a partnership, we collectively sought to exemplify our logo — the dandelion — helping seed and nurture a field. Sharing our decade-long journey is our final step. With a final deep breath, we blow the remaining seeds as far afield as possible to nurture the landscape supporting social innovators across the country.

What is social innovation?

Profile
Roots of Empathy

Early in her career as a social worker, Mary Gordon observed a pattern across cases of intergenerational or lateral abuse: survivors of abuse or neglect struggled to empathize with their children, an outcome of their own trauma, creating the conditions for abuse to beget abuse.

She zeroed in on developing empathy as the key to breaking that cycle, starting with children. "What I'm capitalizing on is empathy as the lever for change," Gordon said. But how to do it?

Gordon realized that observing healthy parent-baby relationships is a rich learning platform for children to develop emotional understanding. She developed Roots of Empathy, a program that exposes students to a parent-baby relationship in the classroom and encourages students to develop a vocabulary for the baby's feelings. By doing so, the students develop a deeper understanding and language around their own feelings and those of others.

Roots of Empathy (Photo by Melanie Gordon)

"Roots of Empathy develops social and emotional capacity in children and this profoundly changes them for life. The hope is that this change can make a big difference in the future as children grow into responsive parents and responsible citizens, and as they take their places in the boardrooms and war rooms of our world," she explained.

Roots of Empathy targets the root cause of violent behaviour, reducing it or preventing it from developing. Through multiple independent evaluations, the program shows a decrease in aggression and increase in pro-social behaviour and social-emotional understanding that is sustained for years afterwards. Growing from a Toronto-based initiative to an international pedagogy, Roots of Empathy has impact, durability and scale.[2]

Roots of Empathy is a strong example of Canadian social innovation. It is an intervention getting at the root causes of an entrenched and complex social problem.

There are many definitions of social innovation. The Young Foundation in Britain, for example, defines social innovation as "innovations that are social in their ends and their means."[3] The members of the Toronto-based Centre for Social Innovation describe their vision as "a world where we put people and planet first."[4] They identify as "a dynamic group of bootstrapping entrepreneurs who navigate chaos and embrace opportunity. We will not forget that being resourceful, nimble and humble make us who we are. We are innovators."[5]

Whatever your preferred definition, the through-line is social impact through innovation, embracing opportunity and being resourceful and nimble enough to navigate chaos.

Because this is the SiG partnership's story — our experience understanding, supporting and nurturing social innovation in Canada — we hew to our own definition, which focuses explicitly on understanding complex social and ecological problems, such as social isolation or rising inequality, and how to approach these problems to turn the tide.

RADICALLY CHANGING THE SYSTEMS THAT CREATE THE PROBLEM IN THE FIRST PLACE.

This is why SiG thinks of social innovation as a journey, where the aspired destination is systems transformation. To get there demands a new kind of journey, one

where we see and work differently. We have to innovate how we think about and go about social change.

This is captured in our formal definition, written by Frances Westley in 2008:

In the context of changing the system dynamics that created the problem in the first place, a social innovation is any initiative (product, process, program, project, policy or platform) that challenges and, over time, contributes to changing the defining routines, resource and authority flows or beliefs of the broader social system in which it is introduced.

Successful social innovations have durability and broad impact.

While social innovation has recognizable stages and phases, achieving durability and scale is a dynamic process that requires both emergence of opportunity and deliberate agency and a connection between the two.

The capacity of any society to create a steady flow of social innovations, particularly those which re-engage vulnerable populations, is an important contributor to the overall social and ecological resilience.[6]

Our starting point is complex problems created by entrenched systems — problems where the component parts cannot be separated from the whole. We recognize that social innovators embrace complexity in their attempt to understand what perpetuates a problem; maybe it's how decisions are made, or what policies are favoured, or false assumptions about people in distress. Social innovators often spring from the frontline — the lived experience of vulnerability — and they understand that re-engaging people cut off or isolated by mainstream systems is critical to changing those systems. They try to understand how vulnerability plays out in someone's life, rather than rely on common assumptions.
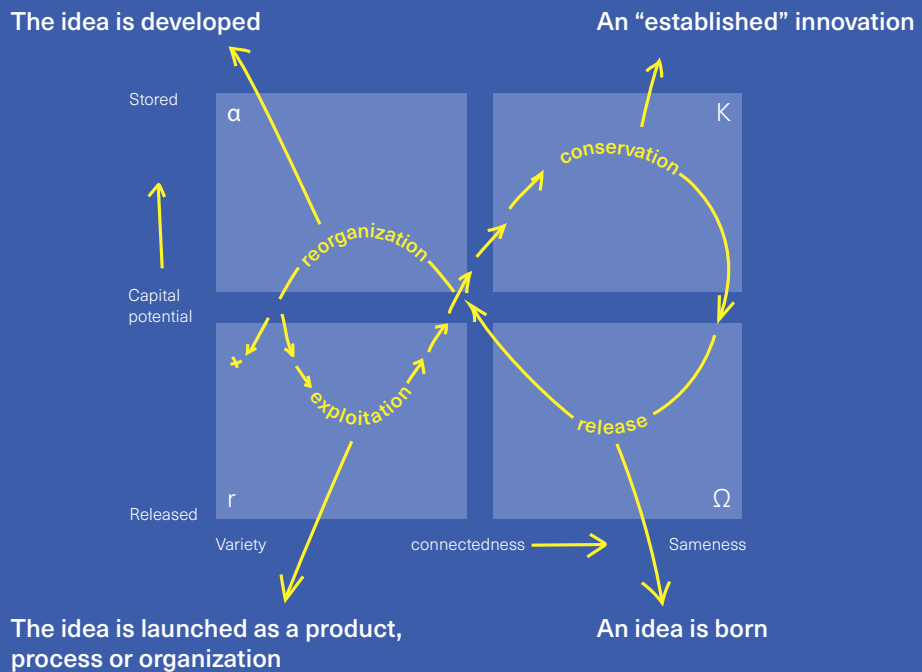
Another commonality we observed among successful social innovators is that they tend to pay attention to the moving interdependent parts of a problem to figure out where best to introduce change and redefine the status quo. They do so through both concerted effort and being attuned to shifting circumstances and players. They learn it's not simply about applying a solution, but supporting a new mindset.

Realizing there is no utopia, SiG focused on resilience: The capacity to reorganize and adapt after a disruption without losing what is essential. It's not just about coping with change, but actually doing well with and even influencing change.

In our 10 years, we learned that the adaptive cycle is one of the most useful frameworks for social innovators. The following graphic breaks down the life cycle of an innovation. We borrowed it, and the focus on resilience, from ecological science, because we found that the dynamics of a forest, for example, parallels that of social systems or the life cycle of an initiative.

Adaptive Cycle[7]

A social innovation is born from a reorganization (or exploration) of resources or ideas. As it develops and gains traction, it enters the exploitation phase. This is the period of uptake, which some may recognize as the traditional S-curve in business parlance, where an innovation moves from early to late adopters. As it embeds into, or redefines, existing systems, it becomes the status quo and efforts are focused on maintaining it. This is where innovators often get stuck. What was innovative and impactful 10, 50, or 100 years ago loses relevance. The innovation, or parts of it, may now no longer best serve the original intention. Entrenched interests resist change, even if change best serves the original goal of the innovation — for example, public health care. Our public health care system is a decades-old social innovation that is now a stuck system, with ballooning costs and diminishing efficacy born of increasingly complex circumstances. The system is ripe for a release of some of the resources maintaining the status quo.

The idea is developed   An "established" innovation

Stored   α   K

                                        conservation

        Capital
        potential

                        reorganization

                                                        release

                    exploitation

Released   r   Ω

        Variety   connectedness ⟶   Sameness

The idea is launched as a product,   An idea is born
process or organization

Walker, B., C. S. Holling, S. R. Carpenter, and A. Kinzig. 2004. Resilience, adaptability and transformability in social–ecological systems. Ecology and Society 9(2): 5.

Our current social systems — innovations from a previous era and different circumstances — are not much different from old forests that have become thick with brush and vulnerable to fire. When lightning strikes, it burns through the brush and thins out the forest. Sunlight can then better penetrate, nutrients are returned to the soil, new growth can thrive. The forest is renewed, despite the great disruption.

Similarly, the release phase of the adaptive cycle is when some things are let go to free up resources for renewal — for ongoing innovation to keep a system aligned to its purpose or to shift that purpose entirely when it is no longer relevant.

This is the cycle of social innovation: serving people and the planet by innovating our stuck systems. To do so, we have to understand why and how things are stuck and how to foster the kind of change that leads to durable, broad and deep social impact.

Critically, each phase of the cycle requires different types of innovators and actors. The entrepreneurial qualities that can drive the adoption of new ideas will not serve the release and reorganization phases in the same way. This need for a diversity of skillsets is a good thing, demanding a breadth of creativity to realize a culture of continuous social innovation.

Throughout the book, we touch on different parts of our definition, clarifying how we got there and where it is useful in practice. Our definition explains our approach, our decisions, our struggles and our hopes for the future of social innovation in Canada.

Forest after fire (Photo by Wanphen Chawarung)
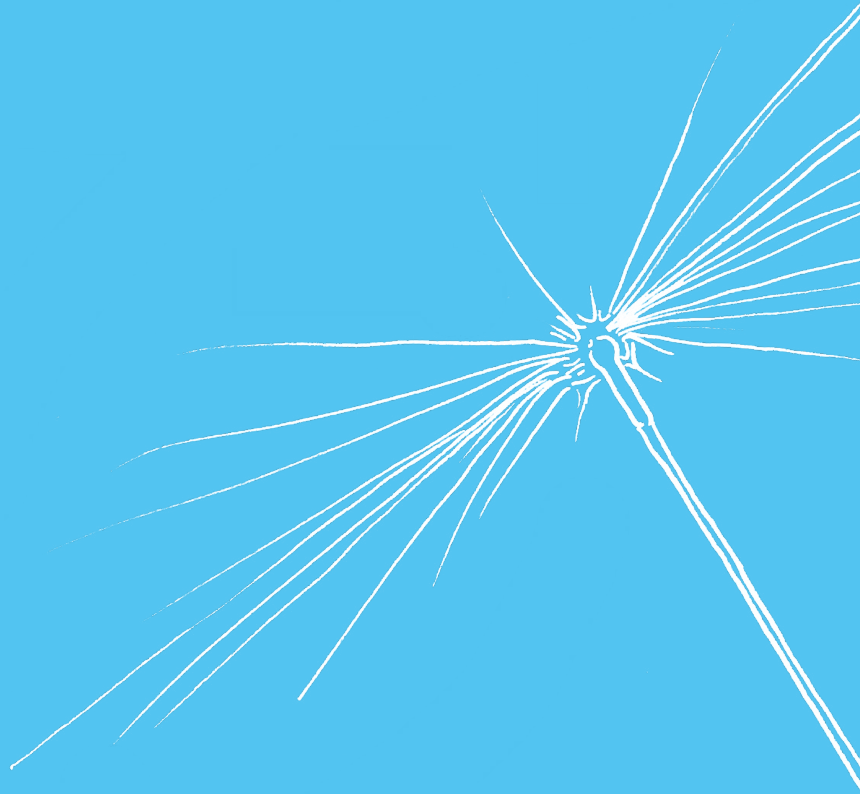
SEED

Getting started: The SiG Story

I feel that what we've had to offer is hope that isn't naive.
We do have tools and we do have approaches for dealing with
things that are really intractable problems, but we do it with
this kind of positive sense that we can achieve change.
You could say it's the most important thing SiG had to offer.

—

**Frances Westley, J.W. McConnell chair in social innovation
at the University of Waterloo**

The Social Innovation Generation (SiG) partnership was a coming together of unusual allies — a private family foundation, an innovation hub, a non-profit social enterprise and a public university — around a common cause. It sprung from diverse relationships between colleagues and friends, woven over time and across careers. There was no playbook. The hope was to work as a generative partnership — collaborating to catalyze and seize emerging opportunities to strengthen social innovation in Canada.[8]

The impetus behind the partnership was to find ways to work across organizations and systems, to make substantial headway against systemic barriers to social innovation in Canada. We recognized that streamlining into sector or disciplinary silos not only doesn't work, but further entrenches problems. The forming of SiG was an attempt to move beyond being individual actors to a place of transformation, where our impact outsized the sum of our parts.

Walking the learning journey together

In the late 1990s, after years of investing directly in innovative community initiatives, the McConnell Foundation, under the leadership of then president Tim Brodhead, arrived at a tipping point. "In a way, the birth of SiG followed years of supporting dozens of people — Mary Gordon (Roots of Empathy), John Mighton (JUMP Math), Leena Augimeri (SNAP) and many others — and then recognizing that this could go on forever," Brodhead recalled. "We could be funding 20 or 40 or 100 [innovators]. And so what? It'll outstrip our capacity unless we hire an army of people."

In response, the foundation took a step back to observe the patterns across various innovator journeys. Rather than continuing to invest in individuals, Brodhead wanted to learn how the foundation could help rethink the process of problem solving.

Lyn Baptist, who joined the McConnell board around the same time Brodhead was hired, remembered him bringing the idea of social innovation into the foundation. "There [had] always been an openness to experimentation on the board. We knew things had to change. There needed to be new ideas and new relationships with our grantees," she said.

In 1998, the foundation pursued a granting strategy known as Applied Dissemination (AD) to help innovative social change initiatives extend their impact beyond a specific community or context. AD was designed to help innovators identify and distil the ingredients of their success to understand what to scale. In other words, grantees were challenged to consider what "type of seeds" were at the heart of their innovation: the core concept, the process, the knowledge and skills, or the entire program?[9] Could those seeds thrive in other environments?

Around that time, the foundation also invested in the first graduate-level program specializing in the voluntary sector in Canada[10] — the McGill-McConnell Program for National Voluntary Sector Leaders, jointly offered by McGill University's Faculty of Management. Dr. Frances Westley, a leading systems thinker and management professor, designed the program with the help of nine other thought leaders from McGill, Concordia, McMaster, York and the universities of Calgary and Victoria. At the time, Westley said, "The plan is to give leaders from the voluntary sector, people who are value-driven, a pause in their work, where they may get their heads above the horizon and figure out how to be better heard."[11]

The program uniquely blended diverse thought leadership with the lived experience of the participants, leading to a new understanding of how significant impact can be achieved. Working closely with Brenda Zimmerman, a York University professor doing groundbreaking work in complexity thinking, Westley integrated systems and complexity thinking into the program. "A lot of complexity ideas were built into that program, not the innovation ideas, but the complexity ideas; we kind of discovered

social innovation in that program because it was a subset of [participating] organizations that were so different, so innovative," she said.

John Cawley, an early program participant who later join the McConnell Foundation, working up from program staff to vice-president, cited the program as a pivotal influence on the foundation and an important step in the SiG story. "From my experience, the theories and the relationships that Frances [Westley] shared with us and [the] ways she nurtured and mentored us as practitioners — it's true it pre-dates SiG — but it's still part of the social innovation journey. We were using these [social innovation frameworks] in very tangible, concrete ways," he said.

Montreal, home to the Foundation (Photo by Geraldine Cahill)

Multiple tributaries converge

With the intensified interest around social innovation that followed the McGill-McConnell program, Westley teamed up with Katharine Pearson, then a program director at the McConnell Foundation, to host a peer-learning group for McConnell Applied Dissemination grantees that focused on understanding and implementing systems change.

Concurrently, Westley worked with Zimmerman, developmental evaluator Michael Quinn Patton and social innovation pioneer Eric "Ric" Young at the McGill-DuPont Social Innovation Think Tank to "marry corporate and social innovation ideas," Westley explained. Their research, which reconnected them with participants of the McGill-McConnell program and with social innovators around the world, led to *Getting to Maybe: How the World is Changed*,[12] a sort of early treatise on contemporary social innovation. Integrating academic frameworks and the lived experience of successful social innovators, the authors sought to reveal applicable insights for people who desire to make a difference.

Even as Westley, Zimmerman and Patton were writing *Getting to Maybe*, the generative relationship between them and the McConnell Foundation in the early 2000s critically advanced the foundation's approach and seeded the early premise of SiG. "[Frances Westley] could actually put language around things we were intuiting. [To] recognize that it's not all one off ... [that] you can predict some of the problems [social innovators] will encounter ... that's really what led to SiG being created," Brodhead said.

From 2005 to 2006, in parallel with the AD learning group, the foundation again partnered with DuPont Canada and Al Etmanski and Vicki Cammack, co-founders

of the Plan Institute for Caring Citizenship, to create the Sustaining Social Innovation (SSI) initiative to actively explore how social innovations become scalable, transformative and enduring. This initiative took Etmanski and Cammack around the world to find organizations and networks similarly compelled to foster positive change, revealing important insights and approaches that would later inform the structure of the SiG partnership. As Cammack recalled, "We were trying to find a non-traditional structure that would continue to heighten the learning and support the capacity of organizations and individuals who wanted to take their ideas forward. The hope was to create a [structure] that would support them to do that."

The SSI initiative introduced the importance of supporting a cross-sector culture of social innovation. "It's not enough to have lots of such innovations. We need to have a continuous culture of creativity. Sustaining Social Innovation was not about the innovations, it was about the system that would allow that [culture] to become entrenched. It could be training, it could be the selection of people, it could be planning appropriate ways to provide support. But the goal was not just more social innovation," Brodhead explained.

By 2006, the rich nexus of learning coming out of the AD learning group, the SSI initiative and *Getting to Maybe* revealed significant steps that could be taken to further support social innovation in Canada, especially from a funder perspective. Katharine Pearson, in her new role as director of SiG@McConnell, summarized four of them in the publication, "Accelerating Our Impact: Philanthropy, Innovation and Social Change" in 2007:

1 Mobilizing and brokering relevant knowledge among researchers and practitioners;

2 Convening individuals and groups with a common purpose across sectors to generate learning and collaboration;

3 Developing leadership capacity for social change;

4 Offering systems transformation (such as skills development, coaching and fund diversification strategies).[13]

While Pearson was writing "Accelerating Our Impact," the foundation confirmed a $10-million investment into a five-year partnership called Social Innovation Generation (SiG). SiG combined the capacity and resources of four diverse institutions and, building off the previous nine years of learning around how to support social innovation, focused on fostering a culture of continuous social innovation in Canada.

Ready to launch

Launched in 2007, the SiG partnership included the foundation, the Plan Institute for Caring Citizenship and two new participants — the University of Waterloo and MaRS Discovery District — as major partners.

MaRS and the University of Waterloo were new players in the field of social innovation. MaRS was in its infancy, an emerging innovation hub providing advisory support and education programs to entrepreneurs in life sciences, information and communication technologies and clean technology.

"Tim Brodhead deserves huge credit for saying we need a player like MaRS," Ilse Treurnicht, chief executive officer of MaRS, said. While it went on to grow dramatically in scope and form, in part because of its role in the SiG partnership, Treurnicht noted it wasn't always so obvious that MaRS aligned with SiG. "I think it

was [Brodhead's] ability to see that the DNA of MaRS was broader than just building a bunch of companies," she said. In time, MaRS's legitimacy and compatibility would create major collaborative opportunities for SiG with business and government that would not otherwise have been possible.

The road to the University of Waterloo was more confusing and disappointing for the staff at McConnell. At the time SiG was forming, Westley understood she would be leading the initiative, that it would be based out of an academic institution and that a key focus would be linking theory and practice. Conversely, the foundation expected that at least part of SiG would be organized to provide its staff and grantees with direct support to embed social innovation ideas and practices in their work, with a physical presence at the McConnell Foundation.[14]

An office was set up for Westley, in the belief she would travel between the foundation and McGill University across the street, despite the fact she was based at the University of Wisconsin-Madison at the time. When it became apparent Westley did not want to move to Montreal, a request for proposals (RFP) went out to Canadian universities, which resulted in McConnell funding a chair of social innovation position at the University of Waterloo.

Brodhead, who retired from the foundation in 2011, reflected on the composition of the partnership: "It was good enough in the sense that everything that has happened since has happened because of that. Was it the best? Probably not. Part of it was that [many of us] knew each other, we had worked together a lot. We were comfortable exchanging ideas and pushing each other. The downside to that is we knew each other well and it made it sometimes difficult to keep the personal relationships and the contentions issues we were dealing with separate. We could have been more diverse."

SiG founding friends Al Etmanski, Vickie Cammack, Tim Brodhead, Frances Westley with Fred Bird (Photo courtesy of Al Etmanski)

SiG is born and stumbles

Once MaRS and the University of Waterloo joined SiG, each sought additional leadership for more intentional engagement with the partnership. Cheryl Rose, who had been working on a national community service learning initiative, was keen to join; Paul Born, founder of Ontario-based Tamarack, who helped mobilize the University of Waterloo's RFP submission to McConnell, introduced her to Westley. At the same time, MaRS and the McConnell Foundation selected Allyson Hewitt, the social innovator behind the award-winning community and social services help line 211, as the director of social entrepreneurship at MaRS and director of SiG@MaRS. The SiG partnership effectively became:

SiG@McConnell
Principals

>   **Tim Brodhead,** president, the McConnell Foundation (retired 2011)

>   **Stephen Huddart**, vice-president (now president and CEO), the McConnell Foundation

SiG@Waterloo
Principals

>   **Frances Westley**, J.W. McConnell chair in social innovation, University of Waterloo

>   **Cheryl Rose**, director of programs and partnerships, SiG@Waterloo

SiG@MaRS
Principals

>   **Allyson Hewitt**, director of SiG@MaRS (now McConnell Foundation, senior fellow, social innovation at MaRS)

>   **Ilse Treurnicht**, CEO, MaRS

SiG@PLAN
Principals

>   **Al Etmanski**, SiG senior fellow (community organizer and co-founder of the Plan Institute)

>   **Vickie Cammack**, SiG senior fellow (co-founder of the Plan Institute)

The early days of the partnership were marked by frequent meetings with little progress. There was general agreement they would be addressing the structural barriers that prevent social innovators from reaching the impact they desire, but clarity on how to get there was elusive.

"The first meeting I went to was one of the worst meetings I ever attended," Hewitt recalled. "People were mad at each other and I didn't know why. There were misunderstandings about the distribution of money that had been granted by the Province of Ontario for SiG@MaRS. Letters of discontent were sent between partners that I had no background for or on and the conflicts felt both personal and professional," she continued.

Etmanski identified that conflict-fuelled year as hard, but productive. "We had terrific fights around terminology and the shift from sustainability to resilience. And the shift from the concept of permanence to profound," he said.

At the request of the foundation, developmental evaluator Mark Cabaj was present at these early meetings to assess the partnership's potential. At the darkest hour, Cabaj invited Michael Quinn Patton, the architect of developmental evaluation, to help. Huddart paraphrased Quinn Patton's assessment: "I've been asked to come in and just lay out for you that, having discussed this with your partners and with you, and upon deeper reflection, I have to tell you the sad news that there is no there, there. There is no SiG. There is no social innovation thing. You're heading in the wrong direction. Don't waste your time. Stop."

"That could be described as a low point," Huddart said. "The partners were exhausted … they were really suffering … I don't think we could have kept that going any longer. But it did produce enough pressure on everybody. You know the partners, the principals [at the time], the people around them, like me and Cheryl [Rose], really wanted this to happen, we could see its potential and were very keen to help out to support the vision, but somehow had to get over the organizational and personal dynamics that were preventing things from moving forward."

Ultimately, the personal dynamics limiting the partnership also helped save it. "For Frances [Westley], Tim [Brodhead] and Al [Etmanski], it was personal. They had worked together, they were professional colleagues and peers, but they were friends too," Cheryl Rose said. "I didn't know that when I started. I could see how friendship was a little crucible within which the storming around the work could happen. It made it very resilient," she continued.

The depth of trust between the partners saw them through the discord that defined its first year, but they quickly discovered bringing even just four different perspectives together does not instantly facilitate generative collaboration. While friendship proved essential to the survival of the partnership, something more was needed.

After Brodhead turned the partnership, such as it was, over to Huddart, the right advice arrived at the opportune moment. "The key insight was that we had to bring in an additional catalytic element to this partnership for it to work," Huddart recalled. Huddart raised the prospect of bringing in a senior-level person to facilitate the partnership and, within two weeks, "Brodhead had offered Tim [Draimin] the job of becoming SiG National director," Huddart said.

Draimin's arrival "changed the game quietly, but significantly," Allyson Hewitt said. It meant the SiG partnership now had a neutral convenor who could help ease some of the tension between the principals. Better still, Draimin's first contribution was something the partners had struggled to find on their own: a shared priority that promised the possibility of change on a transformative scale.

Draimin had been curating Causeway, an initiative housed at Tides Canada Foundation designed to fast-track the adoption of social finance mechanisms to invest private capital in the public good; he was eager to continue that work. Given that social finance dovetailed with the insights from the SSI initiative, which similarly pointed to the significant opportunity to leverage market forces to sustain social innovation in Canada, Causeway was an ideal candidate for collaboration and came at a perfect time for SiG.[15]

"Bringing in the social finance agenda immediately gave everybody something on which to focus, rather than their own feelings about who should be in charge or the structure of this thing. Putting the emphasis on a huge goal was extremely helpful," Huddart noted.

2008 to 2017

In the early days of SiG, the partners had not sketched a theory of how they should go about creating a continuous culture of social innovation. Anita Abraham, former manager of knowledge mobilization at SiG@Waterloo, described how the early partnership was defined, instead, by emergence: "When the principals created that structure, I don't think they necessarily could foresee what that structure would be … I think to be both generative and to be able to say you were [structured], there is a tension in what success looks like there."

Abraham identified a core challenge of collaborating to change systems: How do you preserve the generative quality of co-developing new approaches, while providing

enough structure to guide collaborators through that process? In an effort to start putting together some guiding principles for SiG, Brodhead prepared a Theory of Change in 2008, summarized here:

Vision:

To create a society that recognizes, promotes and celebrates continuous innovation to resolve important social challenges facing Canada.

In a rapidly changing environment, strengthening resilience, inclusion and sustainability requires us to work with complex and interdependent variables, explore and test new approaches and develop a better understanding of how innovation can be recognized and supported. SiG embodies both a set of programmatic initiatives to support innovation outside the foundation and a prod to generate innovation inside the foundation.

Objectives

Achieve transformative change within one or two domains in SiG's five-year time frame;

Create a range of supports (knowledge, consulting, workshops, networks, grants) for social innovators to make their work more efficient and impactful and, by means of these non-granting tools, to make the foundation more effective;

Build and disseminate a body of knowledge around processes of social innovation in Canada;

Model innovative practice in its own methodology and ways of collaborating.

Critical Assumptions

1 A multi-sectoral set of partners can work together effectively and thereby create synergies that amplify their individual and collective impact;

2 There are social innovators in Canada who constitute a market, and who, if supported appropriately, could advance the foundation's overall mission;

3 SiG will have the credibility and legitimacy to leverage change not only in the not-for-profit sector, but more generally (e.g., through dialogue with government);

4 SiG will, in time, engage other actors to reinforce its message and add other insights and assets;

5 That governance (decision-making, accountability) can be informal and communal, and based on personal relationships.[16]

The Theory of Change also described a loose coupling arrangement, where each node would focus on leveraging networks and activities through their institutional homes e.g. SiG@MaRS, SiG@Waterloo etc. The emphasis was on synergies, rather than searching for joint activity.[17] This loose coupling arrangement concerned Katharine Pearson, who questioned, "Is SiG going to be like a holding company, which bundles a number of independent operations for administrative efficiency and/or for

greater branding power, or will it be more like an integrated enterprise where the activities are more than the sum of their parts?"[18]

That question became the yardstick for the partnership. Did we achieve integrated, generative partnership? Multiple SiG principals identified that we were synergistic, but did not grasp that ineffable quality of transformation through collaboration as a whole partnership. Yet the individual nodes did collaborate deeply in radically different combinations and with a multitude of outside and cross-sector partners. In this way, Draimin said, "[SiG] moved along the continuum [from shallow, deeper, deepest] and there were unanticipated ways in which the partners created new value amongst each other."

That new value was a stronger ecosystem for social innovation in Canada — through a shared mission, synergies and various combinations of partnership. In Draimin's public announcement of the formal conclusion of the SiG partnership in 2017, he described SiG's goal as "fostering or encouraging institutions and governments to develop the missing or nascent elements of a robust social innovation ecosystem: the mindset, resources, partnerships, curricula, platforms and strategies needed for social innovations to scale, endure, and have impact."[19]

At the conclusion of the first five years, the partners evaluated their progress. The foundation decided on renewal for three years, then again for a final three, but 2017 truly marks the close of the partnership in its current form. Our legacy will be our investment in an enabling ecosystem for social innovation in Canada. The chapters that follow offer our take about how to enable and support systems changing efforts, including critical elements and approaches, what we found works and what we learned from what didn't work.

"As I think back on it, it's nice to say this was all kind of conceptualized and planned and the rest of it. But that's not the way anything works really," Brodhead reflected. In our own story, we stumbled and, in stumbling, we found our treasure: insights and lessons into the complexity of our problems and how to work beyond ourselves to get at the heart of them.

> **Mythology tells us that where you stumble, there your treasure is. There are so many examples. One that comes to mind is in The Arabian Nights. Someone is plowing a field, and his plow gets caught. He digs down to see what it is and discovers a ring of some kind. When hoisting the ring, he finds a cave with all of the jewels in it. And so it is in our own psyche; our psyche is the cave with all the jewels in it and it's the fact that we're not letting their energies move us that brings us up short. The world is a match for us and we're a match for the world. And where it seems most challenging lies the greatest invitation to find deeper and greater powers in ourselves. —Joseph Campbell[20]**

Dr. John Evans, MaRS Founder
(Photo courtesy of MaRS)

Katharine Pearson, Director, SiG@McConnell
(Photo courtesy of the McConnell Foundation)

Tim Draimin, Stephen Huddart and Al Etmanski (Photo by Komal Minhas)

Structured versus emergent

SiG struggled with the balance of leaning into an emergent process and structuring a way to move forward together. While much energy was spent on the quest for a truly generative partnership, we fell short. However, we learned that we could still create value greater than the sum of individual partners through diverse concurrent partnerships outside of the core four, leveraging our different sectors and networks. With the facilitation of SiG National, we oriented the partnership towards shared goals — a successful exercise of focusing and amplifying our efforts.

Conflict can be a good thing

Periods of conflict can be important for challenging assumptions and moving toward a shared horizon. Conflict turns to collaboration with the help of intentional facilitation, which we ultimately side-stepped in favour of a central coordinating node. Several partners felt that was how the opportunity for greater transformation was missed.

Support the ecosystem

Supporting individual innovators and innovations is a critical role amplified by another: creating the enabling conditions for innovations to thrive. This is where we concentrated our work, based on an operating theory that we could help untold numbers of innovators by tackling the common systemic barriers they face — mindsets, norms and regulations — and improving the capacities, resource flows and licence to operate. By focusing on the ecosystem supporting social innovation in Canada, we took a systemic approach to enable systems change.

The power of a definition

By Dr. Frances Westley, J.W. McConnell chair in social innovation at University of Waterloo

As any social scientist will attest, defining social phenomena is not a trivial process. Definitions allow for precision. As no chemist would allow for an imprecise definition of what elements in what quantities contribute to a chemical reaction, so no social scientist worth his or her salt is content to allow a term, such as *social innovation*, to change its definition as it moves from person to person or context to context. To do so would rob the definition of its power to, well, *define*.

A clear definition points to the characteristics of a distinctive social phenomenon, identifying what is and what is not. It guides the social scientist or the practitioner to focus on certain elements of social reality, for example: power dynamics vs functions, processes vs structures. In doing so, a definition links the phenomenon to a larger body of theory about the nature of society. It places it in time but also links it to history, to the ideas that precede it.

The SiG definition of social innovation — as a process, product, program, platform, project that challenges and ultimately changes the system that created the problem in the first place — is unusual among social innovation definitions in its precision. In terms of social theory, the definition is linked to complexity theory, resilience theory and the structuration theory of British sociologist Anthony Giddens. Like these theories, the definition assumes social problems are the manifestation of complex and cross-scale dynamics.

Resilience theorists argue that all systems — environmental, social etc. — go through continuous cycles of continuity, with slow or incremental change and rapid or radical change that can be transformative. For these systems to be healthy, or resilient, they need to alternate between the dynamics of innovation/change and productivity/institutionalization. Together, the two dynamics define an adaptive cycle, made up of four stages or phases:

Exploration: when innovation processes are most active;

Exploitation: when innovative ideas are introduced to the world;

Conservation: when these become mature products; and,

Release: when the product or project has outlived its productive or transformative capacity and is abandoned for new initiatives.

Together, the release and exploration stage are often referred to as the back loop and the exploitation and conservation stage are referred to as the front loop. No two cycles are the same, but, on the other hand, each stage has recognizable characteristics that allow them to be identified across different initiatives.

For a system to be healthy, it needs to move through this adaptive cycle continuously, alternating between front and back loops. Social innovation represents the back loop tendencies, providing new ideas and initiatives that keep the system healthy. The front loop is associated with refinement, efficiency, reduction of diversity, heightened focus and profitability. It also represents a process of exclusion and heightened vulnerability of multiple groups in a society, a situation that can only be remedied by a new back loop which, among other things, finds a way to reintegrate the vulnerable.

How SiG defines social innovation involves a broader definition of a healthy social system: one where the specialization, focus and inevitable exclusion of the vulnerable from the mainstream

is resolved by innovations that challenge that exclusion and look to engage and include the diversity, richness and social potential of those rendered marginal, and therefore vulnerable, in the last iteration of the cycle.

Social innovation, as we define it, includes micro processes of innovation (creativity) and productivity (consolidation), but also cross-scale analysis. Systems existing at separate scales do not cycle together. For example, individuals, groups, organizations and institutions go through cycles of change and consolidation at different rhythms. While the creation of an innovation may initially lie with individuals and their organizations, its transformative capacity lies in the ripple effects on the existing system and its economic, cultural, social and legal institutions. Unless these institutional arrangements are disturbed by the innovation, the excluded, marginalized, and vulnerable have not truly been integrated; if these perspectives are integrated, disturbance across institutions is evident.

Giddens's structuration theory has allowed us to focus on the action of agents, social entrepreneurs, and system entrepreneurs (or system whisperers). The process of shepherding an innovation from conception to system disturbance ultimately lies in the hands of individuals who, over the many years it takes to profoundly transform institutions, are capable of working together and separately to take advantage of evolving contexts, navigating the shoals and rapids of the river of time, intent on reshaping the institutional context in the interests of the vulnerable and the marginal.

In adopting a definition that deliberately focused on the complex dynamics of social problems and social change, SiG linked social innovation to vulnerability, inclusion, resilience and agency. This choice was prophetic because it led us as a group to focus on building capacity for system entrepreneurs, as opposed to startups and social entrepreneurs only. It caused us to focus on the institutional scale (law, government, economics), as well as on individual innovations. It provoked us to continuously deepen our understanding of the dynamics of this kind of systemic change and to search for those profoundly radical innovations we felt had the capacity to disturb and ignite cross-scale change.

In many ways, it was this definition that set SiG apart from much of the work in the United States, which focused on the creation of novel approaches by social entrepreneurs and was therefore more preoccupied by the characteristics of social entrepreneurs and what was required of early startup phases. Initially in Canada, there was some resistance to the SiG emphasis on transformation and the link to complexity and resilience theory. Criticism centered on the fact the definition seemed to imply a judgement towards those who created new and innovative initiatives that might well improve the lot of a vulnerable population but did not challenge the system that created the problem. This was not true. Differences in approach and definition allow a different understanding of the phenomena, bringing into view different elements of behaviour, different aspects of context, different dynamics. The power of the SiG definition is that it connects research on social innovation to a rich and emerging body of theory about system dynamics, transformation, change and agency.

The SiG definition has gotten the most purchase in Europe, where many initiatives, funded by the European Union, have adopted an approach based on structuration theory and are therefore explicitly cross-scale. It means that much of the work on social innovation in Europe is a combination of innovation theory and social movement theory, placing any individual innovative initiative in a broader context of social change and a longer sequence of historical events and opportunities. It is in this context that the work done by SiG has been heralded as significantly advancing understanding. However, because of the initiation of programs aimed at building capacity for system entrepreneurship at the University of Waterloo and MaRS, we are ahead of some European think tanks in the application of these ideas to the practitioner context.

Like all definitions, SiG's grew from a context — a coalition of those working directly with the vulnerable (Plan Institute and McConnell Foundation), those working with innovation processes and entrepreneurship (MaRS), those working with complexity, resilience and structuration theory (University of Waterloo) and those interested in developing both research/conceptual frameworks and action/practitioner training (Plan Institute, McConnell, MaRS and the University of Waterloo). The collaboration, as this book points out, was not without its difficulties, but the intersection of ideas and convictions, or exploration and application, have made that experience transformative for those involved.

GROW

Curricula: Learning is an action

For me, [social innovation] is not worth teaching in the abstract. It's only relevant in an applied context. As a result, the people that I end up teaching are intimately acquainted with their institutional context. That's all you need as a starting point. They have a particular worldview. It's usually a revolutionary perspective... wanting to reframe the system that they're stuck within or at an intersection of a bunch of broken systems.

—

Darcy Riddell, director of strategic learning at the McConnell Foundation

How do you equip people to address complex problems? This question — and its potential answers — was a central focus and source of debate throughout the SiG partnership. Grappling with this question informed how we think about social innovation in the Canadian context and what it offers changemakers.

It was a question several SiG principals started to explore before the SiG partnership was even an idea, beginning with the McGill-McConnell Program for National Voluntary Sector Leaders in 1999. The aim of the program, jointly offered by the McGill University Faculty of Management and the McConnell Foundation, was to enhance voluntary sector leaders' capacities "to understand, adapt and respond creatively and effectively to the underlying forces transforming Canadian society and the world."[21]

It was the first of several practitioner-focused learning programs on emerging insights into transformative change — or social innovation — that Frances Westley, J.W. McConnell chair in social innovation at University of Waterloo, developed and iterated over 17 years, in collaboration with York University professor Brenda Zimmerman, developmental evaluator Michael Quinn Patton, and many others. *Getting to Maybe: How the World Is Changed*, authored by Westley, Zimmerman and Patton, and published in 2006,[22] became a milestone summary of these insights at that time, born of practical academics connecting with thoughtful practitioners.

From the experiences of seminal social innovators around the world, *Getting to Maybe* identified the patterns of approach and mindset that would become foundational to curricula, programs and training opportunities for individuals and organizations "who have a stake in addressing the urgent [complex] challenges of our time."[23] For Cheryl Rose the insights from *Getting to Maybe* inspired a turning point in her career.

GETTING TO MAYBE: THIS BOOK IS FOR THOSE WHO ARE NOT HAPPY WITH THE WAY THINGS ARE AND WOULD LIKE TO MAKE A DIFFERENCE. THIS BOOK IS FOR ORDINARY PEOPLE WHO WANT TO MAKE CONNECTIONS THAT WILL CREATE EXTRAORDINARY OUTCOMES. THIS IS A BOOK ABOUT MAKING THE IMPOSSIBLE HAPPEN **HOW THE WORLD IS CHANGED.**

Getting to Maybe seminal publication

I was heading up a national push to shift the way universities showed up in their communities. It was through this particular intervention where [community] partnerships would be formed in the teaching of courses, real contributions would be made, students would have [community] experiences and it would, hopefully, motivate them to keep [community] issues in their minds and hearts as their lives went forward.

I was really naive about it. I started off thinking, "Well, this is such a great idea — if people just know about it, they can do it, of course!" I thought, "Clearly, it would be such a wonderful opportunity and it's needed; we can do it and we can do it well."

I worked at it for a number of years, flying around the country talking to university campuses, meeting with [university] presidents, deans, students, community members. And [I faced] incredible resistance — it didn't matter how much I told people what a good idea it was, how much it is needed or what a difference it would make in people's lives. The system was like, "yeah, it doesn't work."

And then I read *Getting to Maybe* — I still have that copy. It gave me language, explanation, rationale and tools that I could use to make choices in moving forward around what I was experiencing working for very complex system change. It really helped me to understand it better.

I thought, "If I had this kind of stuff when I was putting this plan together six years ago, we could have done so much more." And I wanted to be a part of getting that out there to help other people who could really use it. —Cheryl Rose

As director at SiG@Waterloo, Rose lived up to her commitment to get this thinking into the hands of people who could use it. Through SiG@Waterloo, which spearheaded the creation of the Waterloo Institute for Social Innovation and Resilience (WISIR), "SiG created a space to ground research, education and methodology in the realities of people trying to solve complex issues," Rose said.[24] "We learned so much from SiG partners — Al [Etmanski], for example, is the best case study of a systems innovator you'll ever find — and they challenged us to keep our work relevant to the social innovator doing the messy work in the field," she continued.

The method, or pedagogy, tested amongst the SiG partners was learning as an action; learning was approached as a reciprocal and lived experience between practitioners, facilitated by thought leaders and frameworks.

Getting a hold of a piece of hope

SiG's definition of social innovation was an outcome of the systems thinking it describes: diverse thinkers and doers bringing multi-disciplinary insights and a commitment to justice and impact together as a reflective framework for new action in a time of growing urgency. Darcy Riddell, director of strategic learning at the McConnell Foundation, described the relief practitioners feel when given the language and complexity frameworks to see their work in a new light. "It's like a parched woman in the middle of the desert reaching for a glass of water, [her reaction is] 'Thank God, this thing came along!'" Riddell said, adding that Frances Westley's work had that effect on many people.

In the course of 10 years and multiple learning programs, SiG's principals explored, refined and distilled their learning, repeatedly coming back to a set of

principles that resonated with practitioners and effectively helped them get past periods of being stuck. These principles were recognized or refined during various programs, including, but not limited to:

Waterloo-McConnell Graduate Diploma in Social Innovation: Applied Social Innovation for Effective System Change (three cohorts)

Entrepreneurship 101 @ MaRS

Getting to Maybe: A Social Innovation Residency at the Banff Centre (three cohorts to date)

Innovation Leadership Program: New Change Strategies for a Complex World — with the Haida Gwaii Higher Education Society

The Rockefeller Foundation Global Fellowship in Social Innovation (three cohorts to date)

Studio [Y] Fellowship @ MaRS (five cohorts as of September 2017)

The SiG Knowledge Hub (online platform)

Innoweave: Practical Tools for Social Innovation (online platform)

Social Innovation for Complex Problems (massive open online course)

Frances Westley and Cheryl Rose (Photo courtesy of Waterloo Institute for Social Innovation and Resilience)

Start where they are

The value of learning as an action starts with honouring people in their own context and mindset. Social innovation is a commitment "to be students of reality," Riddell said. In the Gedenkschrift, or tribute, to honour Brenda Zimmerman following her passing in December 2014, Michael Quinn Patton recounted her astute observation regarding the widely accepted, but paralyzing precept that people should know with certainty what will happen as a result of an intervention in complex circumstances. "The people making these demands, [Zimmerman] said, seemed to ignore what they knew about the real world, about their own lives, or about biological and ecological systems, even at an elementary level," Quinn Patton wrote.[25]

He further elaborated on Zimmerman's self-described approach to helping people move past this precept: "I begin with distinctions between simple, complicated, and complex. I begin by honouring where people are and build on what they know. They

know that some things are pretty simple and some things are complicated. And after we talk some, they get it that the complex is different from the complicated. I try to make it a challenge of matching: what works for what situations? That's the starting point. Different approaches are needed for different situations. So I begin by helping people differentiate situations. The rest flows from that."[26]

This same principle came to Allyson Hewitt as she took up her role as director of SiG@MaRS and began testing different ways of integrating social innovation into the defining STEM and entrepreneurship streams at MaRS. "We met people where they were at, which meant entrepreneurship," she said. "That's what they get, so we integrated social into their understanding. For a long time, I tried to create Social Entrepreneurship 101 and to develop the Social Entrepreneur's Toolkit, spending a lot of time and money in the process. And then it occurred to me, 'This makes no sense! I'm going to go to Entrepreneurship 101 and work with them to change the curriculum and I am going to speak early on in the courses and plant the seeds that it is possible to make money and make an impact.' And that was revolutionary to people," she continued.

Use frameworks to unlock action

> SiG saved me 10 years of trying to understand the dynamics of change. It has really helped propel my thinking forward and I have been able to just build on that ever since.
> —Survey respondent[27]

Frameworks can be useful tools to illuminate new forms of action, by "helping frame issues in a way that people better understand what they are facing," Mark Cabaj noted in Zimmerman's *Gedenkschrift*.[28] In the case of SiG's learning programs, we learned the value of weaving elements from different frameworks into an operational mindset that strengthened changemakers' capacities to act in complexity and navigate different pathways to systems change.

We went through "extremely rapid theory development and reality testing" with programs such as the Graduate Diploma in Social Innovation, creating a "combination and integration of concepts and disciplines through iterative exposure to the tacit knowledge and experience of practitioners. This process [was] both unusual, and much faster than is common," Sam Laban, manager, education programs at SiG@Waterloo wrote in his developmental evaluation of the diploma in 2013.[29]

As a result, Laban wrote, each year of the diploma further developed "a coherent set of ideas about the nature and practice of social innovation — e.g. Design and Social Innovation; Agency and Emergence," while also creating "new ways to teach the practice of social innovation — e.g. the practical application of systems thinking / mapping for practitioners responding to complex problems; social innovation as bricolage — building alternate systems not just creating new products or programs; sensitivity testing (understanding of context)."

While multiple frameworks proved useful in different contexts, there was a through-line rooted in systems thinking, structuration, complexity and resilience theories. Together, they helped unlock a core set of capacities that supported and enhanced transformational change efforts:

1 Look at the problem in a systemic way and continue "to see the system as it unfolds, in terms of its connections."[30]

2 Understand the problem in its complexity: bring together multiple vantage points on the dynamics in play as they emerge; you don't have to have everything figured out in advance, but watch for and interpret emerging patterns.[31]

3 Focus on balancing adaptivity and introducing novelty or alternative systems, not fixing or solving: successful social innovation is a link between vulnerability and resilience.

4 Recognize you are part of the system that you're trying to change; it is never us vs them.[32]

Developing the fourth capacity involves recognizing and grappling with the tension between agency and emergence — between individual or community agency and emergent system dynamics. It is easy to go down the rabbit hole of one over the other but to live in the middle "takes courage and comfort with conflict and ambiguity. Frameworks around 'who am I in this system?' and 'who am I in the change?' are really important," Darcy Riddell noted.

For Lori Hewson, director of community investment at Suncor Energy, developing this last capacity was an important part of her experience during the Graduate Diploma in Social Innovation. "It was in our first module, the time for our cohort to come together into teams around projects," she said. "Steve Williams was doing his pitch for an energy team and I was avoiding it! He pitched why someone from the system should be part of it. That is where the journey began." Hewson ultimately joined the energy project team, cultivating a depth of learning and relationships that would later inspire her role as a key bridging innovator, supporting Suncor Energy to become a critical collaborator in what would become the Energy Futures Lab (EFL).

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Relationships are a means and an end

SiG continued to realize the value of designing the conditions for trust and relationships into learning programs; as participants developed social capital and mentorship networks, they gained greater opportunities for experiential and peer-learning, catalyzing critical insights and understanding. A core feature of our learning programs became cross-sectoral and intergenerational engagement to accelerate practitioners exposure to different perspectives and help them strategize about how to act on those new perspectives.

In their 2006 paper, "Social Silicon Valleys," the U.K.'s Young Foundation identified the essential link between innovation and relationships, noting that "the detailed study of innovation has put an increasing emphasis on the value of relationships rather than formal stocks of knowledge or assets. Some of the more recent work on the experience of innovation has shown that it is more like a cultural activity than traditional science."[33] Through SiG's learning programs, we similarly observed that, as peers become learning partners and sources of knowledge and inspiration, they also become potential allies, helping each other move beyond the limits of their domains and connect across imagined or real boundaries. Community organizer Al Etmanski eloquently summarized this insight in a 2015 blog, writing, "social innovations not only emerge from relationships, but also thrive and endure in relationships."[34] As we sought to improve how we animate relationships to help social innovations, and innovators, to thrive, we continually evolved and iterated our learning programs.

In collaboration with the Suncor Energy Foundation, the SiG@Waterloo team reimagined the Graduate Diploma in Social Innovation at the University of Waterloo as Getting to Maybe: A Social Innovation Residency at the Banff Centre for Arts and

Creativity in Alberta. The shift was an important evolution, lifting the "limits to the kind of teaching you could do, the course content you could offer, and critically, real limits to accessibility," Cheryl Rose said. "There were practitioners that didn't have an undergraduate degree or didn't have a high enough average in their degree to be accepted into graduate coursework. It had nothing to do with relevance or intelligence. I found that so difficult. So when we had the chance to ask, what next? I was excited to say, let's take it outside the university," she added.

2016 Getting to Maybe Residency cohort (Photo courtesy of Waterloo Institute for Social Innovation and Resilience)

With the move to the Banff Centre, relationships flourished as the source and sustenance of social innovations. "[The Residency] brought the depth of the academic thinking together with the arts and nature-based sense of systems and self in systems. The deep level for thinking and feeling is really exciting. It's been really interesting to see how it's evolved and the other layers of learning woven into the academic program." Lori Hewson observed.

A separate but equally powerful relationship led to the Rockefeller Foundation's Global Fellowship in Social Innovation. "The question we started with was around social innovation practice and knowledge," Amira Bliss, the Rockefeller Foundation's associate director, recalled. "We had a long conversation with Frances [Westley] around 2014. We aligned on the idea that social enterprise alone wasn't going to drive deeper large scale impact. From there we co-created the idea of a fellowship that engaged the systems entrepreneurs around the world. It's the most inspiring and energizing program in our innovation portfolio," she continued.

For Rose, the question of how useful the concepts would be in an international context was interesting, "I was thinking, will this resonate? Will it make any sense? And it did immediately. It's because the system dynamics, these social systems that we create are similar across the world. When they begin to operate dysfunctionally, then it is the same kinds of system barriers that you keep running into," she said.

Press pause

Perhaps most important, however, for the most intense and hyperactive among us (our entire cohort, perhaps?) was the opportunity to stand still. Borrowed from a poem by

David Wagoner that Frances Westley shared with us, the phrase "stand still" became a mantra. Whether through the early morning smudges, meditation, poetry, a solo on the land, or other contemplative practices introduced throughout the month, stillness crept in, nudging out frenzy and creating space for reflection. — Jill Andres, changemaker in residence, Mount Royal University and Banff Residency participant[35]

Pausing for reflection strengthens every other capacity that enhances transformative work. It is one of the most valuable, and often least valued, capacities in the 21st century. It is a process Katharine Pearson, former director of SiG@McConnell, referred to as "balancing thinking and acting,"[36] mutually reinforced by complexity and systems frameworks. In pausing to reflect, practitioners rediscover their hunger for impact. As Darcy Riddell explained, when they have taken a pause to recognize that continuing to push in the same way won't work, "They begin to adapt their practice, because they've encountered a more fulsome story of how they could make change."

SiG's learning programs demonstrated the value of facilitated reflective practice — curating opportunity, intention, safety and trust to guide practitioners into and through the vulnerability of self-awareness and a readiness to take what they experience into their work. That readiness is critical to helping innovators grasp new forms of action that contribute towards systems change.

I think one of the amazing things that SiG has always done is paused and reflected. We go at such a mad pace that [we need] time to collectively pause, breathe, reflect, before projecting again. I think that madness, the whole competition — and I don't mean one against the other, I mean against time — the race people feel to change the world has been relentless. — Mary Gordon, founder and president of Roots of Empathy

As SiG co-developed and iterated multiple learning programs, we refined our insights into critical capacities for addressing complex problems. Those described in this chapter are not shared simply to inform future program design; they also describe essential steps on a social innovation journey, inside or outside a classroom. Our challenge ongoing is to continually create safe spaces for people to experiment and reflect while sharing their learnings with others in a way that works for them.

When I look back over the number of programs that I've designed now and led, maybe we're not at a tipping point, but I think we've contributed to approaching a threshold where people just don't think of problems the way they used to think of problems. I wouldn't say we can attribute that just to us. Certainly not. But I think we've certainly contributed to that. — Frances Westley

Two capacities at the core

How do you equip people to better address complex problems? Enable them to understand who they are in their work and why they do it at a fundamental level. At the same time, help people see they are part of the system they are trying to change, without being single-handedly responsible for the whole. The balance is learning to ask questions about the whole problem, while realizing we are one of many agents: We can learn where we are best positioned to act and influence.

Start where people are at

Lead with something people already know to help open their perspective to another worldview. Brenda Zimmerman often introduced people to complexity thinking with the distinction between simple — following a recipe; complicated — sending a rocket to the moon; and complex — raising a child, using familiar analogies to help distinguish why we need to approach complex problems differently.

Pausing helps you accelerate

SiG's experience of learning programs consistently demonstrated the benefit of balancing doing with thinking and reflecting. With time, space and guidance for reflection, innovators process new insights, challenge their assumptions, fears and biases, and integrate new perspectives and insights into their daily work. Shifting our own mindsets and turning what we are learning into action demands time, intention and healing.

Learning is an action

Learning is not an additive or adjunct activity, it is a constant source of fuel for innovation. SiG worked to ground structured learning opportunities in practice, recognizing a social innovation journey is one with many fellow travellers that will enable our way forward. At their best, learning programs create space to help us see these fellow travellers, hear them and connect with them.

Convening: The breadth-depth conundrum

You will never be fully representative [in a convening]; getting the right mix of people has more to do with what you want to accomplish and which voices need to be heard, than with achieving some perfect balance or representation.

—

Beth Hunter, program director at the McConnell Foundation

When done well, convenings can create unusual allies, build coalitions, catalyze collaborations, enable people to work through shared challenges, build capacity and community, or advance a field, turning it into a movement.

After using and testing multiple types of convenings throughout the SiG partnership, we found a correlation between convening type and desired outcome. We learned to design convenings based on the quality, depth, breadth and diversity of relationships most aligned to the desired outcome at that time. Being clear on intention was critical.

This learning was hard-earned, after tackling a number of questions as we developed a working knowledge of design and facilitation conditions for catalytic outcomes, including: If convenings are inherently exclusive, when and to what end is their greatest value? For how long? What is the right container for what outcome?

Tim Draimin, executive director at SiG National, called this a continuum of usefulness, noting: "The different ways in which we coordinate or organize our work are really good for certain periods in certain stages. In later stages, it must change shape in some way. I [say], try to maintain the balance between what you're offering to people." This balance is one of breadth and depth — a tension between inclusion and novelty, outreach and intimacy that must be considered in any convening design.

Inclusion, novelty and outreach are critical factors to shifting paradigms from the usual and accepted way of doing or thinking. Intimacy is critical to fostering the trust that bridges long-standing silos into partnerships, develops deep and reflective learning exchanges and opens enough space to be wrong, to share challenges and to be changed.

An early social innovation convening called the Applied Dissemination [AD] learning group, while a precursor to SiG, helped influence our understanding of the value of intimacy — and its limits. Co-hosted from 2002 to 2007 by Frances Westley, who went on to become the J.W. McConnell chair in social innovation at the University of Waterloo, and Katharine Pearson, then a program director at the McConnell Foundation, the group was a peer-learning offering for grantees of the foundation's Applied Dissemination stream to rethink how to spread their impact. It was intimate and critiqued for being exclusive and finite. Yet for the participants, that intimacy was key to achieving the goals of the group: enhancing social innovators' capacity to identify and distil the ingredients of their success and develop new pathways to scale.

Mary Gordon, president and founder of Roots of Empathy and an early AD participant, explained that, "what happens in an [intimate] group like that is you develop relationships amongst each other where you feel a really deep level of trust because you're there talking about all your challenges. Things that you were doing well but, equally important … where you needed help. It was a very difficult process to go through. The initial [AD] group took time to develop those feelings and it's hard to introduce new people into that process."

For McConnell board member, Lyn Baptist, the AD learning group was transformative both personally and for the foundation's learning, "I attended the AD meetings for seven years. It was a great experience as a funder to be in the room with a group of eight to 10 grantees sharing knowledge, challenges and frustrations. There was a trust established as well as enduring supportive relationships. This was an invaluable convening for the foundation," she said.

As the AD learning group closed, SiG began and we benefited from insights of that program as we sought to host a range of convenings that consciously recognized and held the tension between vulnerability and resilience: Intimacy vs inclusion, safety vs provocation. We discovered there are moments, for example, when safe spaces are essential for the uptake of a new paradigm — like reconciliation — or for transformational relationships. We also learned there are moments of too much resilience, where

WHEN THE USUAL SUSPECTS GET TOGETHER AGAIN & AGAIN

provocation, an injection of novelty, is needed to shake loose the status quo and kickstart a reorganization of ideas, people, and resources.

> **All of this is built around relationships. How do you convene around helping to strengthen the social capital of the people that you're hoping are going to end up working together and become more open and amenable to some of these newer ideas that you are injecting into the system? —Tim Draimin, executive director of SiG National**

It was through Causeway, a multi-stakeholder project to catalyze social finance in Canada, that SiG actively began testing out different convening strategies. In the beginning, Causeway started as an open community of practice; regular teleconference calls took place, which anyone could attend. As the work deepened and pathways forward became clearer, a stronger emphasis was placed on critical connections with those that could directly influence institutions and reshape the finance landscape. For Joanna Reynolds, the first program manager at SiG National, the focus on key influencers was at odds with her community building background. "At first, I thought it was very elitist," she explained. "It rubbed me the wrong way. But I was in a learning place and I learned that our strategy in part was to allow decision makers to see value in the opportunity. You can't have [a public strategy] without the other [more targeted strategy]. I came to appreciate the focused attention on those influencers because … [in terms of our approach] where do we pivot to get deep, scalable change? Sometimes that comes from people who can pivot an organization to have a larger impact," she continued.

SiG developed a multi-pronged approach, targeting key decision-makers, as well as public education and outreach around social finance. Reynolds emphasized that the power of the targeted engagement was amplified by the public community-building approach and that the two must be linked. "That's why we started the Social Finance Forum (SFF) as a place for conversation," she said. "SocialFinance.ca was also really important to me. It was important that we engage across sectors and have a broad communicating strategy as a place for public education and collaboration," she added.

AN ANNUAL SOCIAL FINANCE CONFERENCE IN CANADA

With more than 30 events throughout the course of the project, Causeway's multiple complementary channels of engagement helped to create an enabling environment for social finance in Canada. The "convenings targeted audiences to build the case for social finance, leverage finance, highlight market opportunities, such as the Community Forward Fund, address provincial and federal policy issues facing the sector and develop a community of practice," Tim Draimin said.

Yet, it was the 2009 Study Tour for Social Innovation and Social Finance to London, England that moved interest to action and ignited "key cross-sector leadership in the potential impact of social finance in a Canadian context."[37] The Study Tour introduced participants — including SiG principals, foundation leaders, civil servants, civil society leaders, and academics — to new and deep connections for ongoing learning partnerships with the U.K. social finance ecosystem, which was years ahead of Canada, and with each other, which was critical. For many participants, the study tour was the first opportunity to spend time together, a catalytic moment that deepened their ability to collaborate on the social finance work — and on SiG.

With Charmian Love, a Canadian and former BCG staff member-turned social purpose business pioneer, as the London host, participants gained access to the history and insights of the British social finance field first-hand and developed

critical relationships to draw from in the years ahead. Cheryl Rose, former director of programs and partnerships at SiG@Waterloo and a participant on the tour, observed that "the greatest leaps forward in SiG seemed to come after people had time to build relationships and connect in non-pressure-filled ways, like the social innovation tour in the U.K."[38]

The 2009 Study Tour was a watershed moment for Canada's social finance movement and a turning point for SiG, giving us, and all tour participants, a sense of what was possible. It demonstrated the opportunities made possible by a well-timed moment of depth and familiarity and energized both the Causeway and SiG partners with knowledge, evidence, tools and thought partners that better prepared us to engage a broader coalition of support in Canada.

This is one of the unique strengths of study tours: They till the soil for rich cross-jurisdictional learning, inject novelty and insight to catalyze action, and enable boundary-spanning collaborations. That said, they are resource and time-intensive, limiting the breadth and reach of impact to a narrow band of participants, who are then responsible for amplifying and applying their experience with others.

Inspiring action for social impact

Alongside the individual and collaborative convening efforts of the SiG partners, SiG National took on the responsibility of amplifying and applying global learning and insights to a broader audience. In 2011, the National team created a multi-year speaker series to bring international and regional thought leadership to different locales and larger audiences. Titled the 'Inspiring Action for Social Impact' series, or IASI for short, this national speakers series was "comprised of a mix of in-person and online public talks by international thought leaders, applied learning workshops and dialogue on practical strategies for social innovation in Canada."[39]

Between 2011 and 2017, speakers from Canada and around the world were invited to give presentations on topics ranging from co-production and collaborative economies to Indigenous innovation, policy innovation and social innovation labs. Speakers included: Lucie Stephens, Geoff Mulgan and Charlie Leadbeater from Britain; Christian Bason from Denmark; Ezio Manzini from Italy; Dana Shen, Peter Shergold, Carolyn Curtis and Ingrid Burkett from Australia; April Rinne from the United States; and Miquel de Paladella from Spain. The presentations, recorded in front of a live audience of between 40 and 400 people, were then made available online.

Through the series, SiG sought to cast the legitimacy, tools and provocations each speaker introduced further afield, hopefully offering that just-in-time insight to a social innovator or enabler in Canada. We focused on creating broad access to new ideas and exemplary stories and frameworks.

When possible, we also arranged local tours of communities to introduce an international speaker to impacts and opportunities on the ground. This connection between international experience and local insight could be extremely powerful, opening up both community leaders and international guests to possible collaboration, shared learning and greater confidence in their respective social impact strategies. For example, during the 2016 IASI tour by The Australian Centre for Social Innovation, chief executive, Carolyn Curtis and director of learning and systems innovation, Ingrid Burkett participated in a learning circle hosted by the Winnipeg Boldness Project. Insights from both sides were shared on Indigenous innovation, experimental approaches and sustaining innovation, that informed each organization's practice despite operating half a world apart.

Yet as SiG National focused on the breadth of our outreach, we did not want to lose the power of intimacy to impact key constituencies. Rather than trade off

between breadth and depth, we leveraged IASI speaker engagements to do both, with what would become a signature dinner debrief. Seeing the chance to connect informally over a meal as fertile ground for people to share their thorniest issues openly and honestly, Tim Draimin began inviting IASI speakers to dinner following their presentation, along with individuals who had come to his attention as ready to build on or benefit from the insights of the speaker. These dinners were a unique opportunity to try to even more intentionally match people with a just-in-time idea, inspiration or mentor.

SiG also introduced a public-sector focused series, that while targeting a specific sector, attempted to break down jurisdictional silos and introduce civil servants to unknown allies and partners in other departments, cities or provinces. The inauspiciously named Public Innovation Telepresence Series (PITS), produced in partnership with Cisco and MaRS Solutions Lab, hosted civil servants in Telepresence rooms in multiple cities across the country — up to 20 per room. The format capitalized on technology to bring in subject experts specific to public innovation and animate small group discussions among participating civil servants from across all levels of government.

PITS became both a capacity and relationship building opportunity for Canadian public servants, with multiple participants citing the interaction with other innovation focused or like-minded civil servants as the greatest value.

> **Great to (re)connect with folks on a regular basis ... also very productive to do so around content-related issues. It re-energizes and glues us together before we [have to] dive back into siloed cultures.**
>
> **Was left wondering why there aren't more fora for innovation teams across the federal government to interact with each other. — Anonymous PITS survey Feedback**[40]

The IASI and PITS series sought to advance the field of social innovation in Canada with inspiring evidence from and solidarity with other communities in Canada and the world. We wanted to "inspire action" and set up the conditions for it to happen through emergence (the power of breadth) and strategic alignment (the power of depth).

Go home to go big

Over time, we found the most powerful approach to unlocking the full value of trust, particularly across boundaries, was learning groups and retreats. More than readying people for innovation, these in-depth processes of trust-building across geographies, sectors, incentives and interests were fundamental to letting go of existing biases, fears, assumptions and interests so that shared visions and impacts could lead the way. SiG benefited from access to rustic retreat spaces, such as Wasan Island in Ontario and Bowen Island in British Columbia, where natural surroundings helped strip back professional and defensive postures, readying people to engage with radically different, or even conflicting perspectives.

Through this combination of trust-building and personal work, we leveraged learning retreats to foster new or nascent communities of practice, such as SiG fellow Vinod Rajasekaran's catalyzing of a social research and development (Social R&D) community, now growing across the country. We also hosted or co-hosted retreats

to deepen the level of collaboration between existing peers, such as the Social Innovation Exchange's Funder's Node, a global learning network of social innovation funders.

Between 2013 and 2016, the Third Inflection Point gatherings pushed the goals and approaches of SiG's retreat-style co-convenings to a new horizon. Community organizer At Etmanski developed the Third Inflection Point (TIP) with Paul Born, president of Tamarack, who encouraged Etmanski to convene a unique learning community. Etmanski saw TIP as a natural evolution of the SiG conversation — a "post-scale phenomenon" focused on engaging culture(s).

Mark Cabaj and Kelsey Spitz (Photo by Tim Draimin)

The concept is summarized here:

> **The first inflection point** refers to a place where a social innovator might have reached moderate success: a good idea has been implemented;

> **The second inflection point** comes when an innovator realizes no matter how well the social idea or program is implemented, there are larger and more complex underlying challenges in society to address. Scaling up — often in the form of policy change — is required;

> **At the third inflection point**, a different quality of practice is needed to address the roots of problems. Even after scaling up, the more ambiguous and entrenched qualities in cultures persist. This practice takes increasingly ambiguous, collaborative, and diverse forms, in response to shifting perceptions of problems, and insights into the scope of change required to transform them at their roots.[41]

Etmanski explained it as "You're in effect saying, in your attempts [at systems change, that] you've been unsuccessful in engaging with the wider culture. And I think that's a big juicy jolly challenge worth grappling with. And admitting our limitations and going back at it and doing it differently." Working with Vickie Cammack, his co-founder of the Plan Institute for Caring Citizenship, Darcy Riddell director of strategic learning at the McConnell Foundation, Tatiana Fraser co-author of *Girl Positive*, and Kelly Hawke Baxter vice-chair of Natural Step International, Etmanski co-hosted multiple peer-learning TIP retreats to push the boundaries of social innovators out of the language of systems change and into the amorphous space of shifting cultures.

Gather: Emergence is always there

In the 10 years of the SiG partnership, we learned which types of convening align to which purpose. We noticed a generally inverse correlation between depth of relationships and number of people reached and observed how that relates to desired outcomes.

The nature of a convening is complex — it's social and generative. You can create conditions that are likely to generate a specific outcome, but may not. The images illustrate our experience of what types of convenings are best suited to support a certain outcome and why.

AKA
MOST LIKELY!

Creating the right container — correlations between convening style and outcomes

Type of convening

# of people reached

Depth of relationships

- Webinar
- IASI
- Summit
- Telepresence
- Meal
- Study Tour
- Retreat
- Learning group

Desired Outcomes*

- Finding your dance partners (boundary spanning)
- Co-creation or collaboration
- Working through shared challenges
- Capacity-building
- Community building
- Legitimizing or advancing the field
- Paradigm shifting
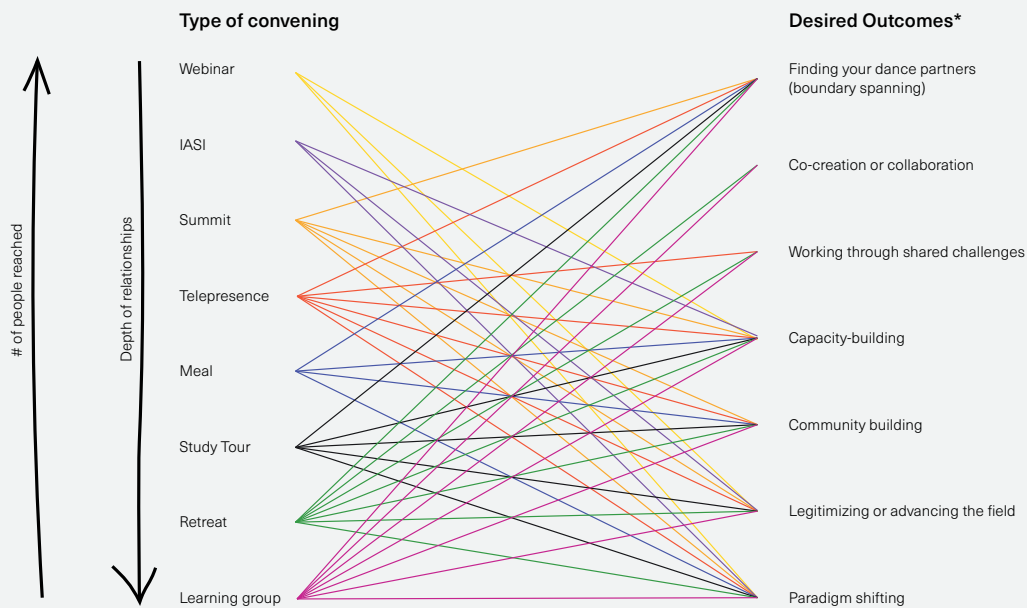
* correlations between type of convening and desired purpose, revealing patterns on which containers best produce which outcome, based on SiG's experience.

Time investment of convening

- Learning group
- Study tour
- Summit
- Retreat
- Telepresence
- IASI
- Webinar
- Meal

Depth of relationships
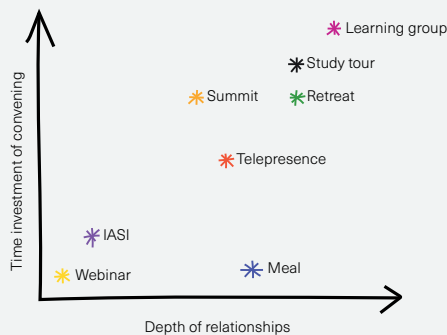
Every convening has the potential to seed a significant shift, planting a thought in someone's mind that disrupts how they see themselves and the world around them. The 2015 and 2016 Indigenous Innovation Summits, hosted by the National Association of Friendship Centres (NAFC), were significant for how each shifted the ground for both Indigenous and non-Indigenous innovators; with several SiG principals invited to participate in different ways at each Summit. Crucially, as the NAFC summarized in its report back on the 2015 Summit, participants left with a shared understanding that "Indigenous communities are innovative by nature."

> **Our teachings remind us to look seven generations back and seven generations forward. Our communities have not always been leading the discussions about social innovation because we did not always use the same language. We are now joining the space, having the conversations with other Indigenous communities and organizations, but also working with a variety of other partners to bring our learnings together with the learnings of other innovators. The Summit provided the space for this to take place.**[42]

Systemic and sustained shifts in a society — the civil rights movement, the women's movement, the current process of reconciliation in Canada — do not happen lightly, methodically or systematically. Yet convenings, with all their emergent and generative possibilities, can be critical way stations, influencing one person, or one audience, to see things differently.

> **[Coming together is] an opportunity to cultivate knowledge and share experiences of shifts that are happening and to put some good thought and practice there. There's real intention around understanding how systems change. Convening people provides high value for our capacity to see possibilities and forge pathways for change.**
> **—Joanna Reynolds**

Peer Input Process, SIX Summer School 2014 (Photo by Komal Minhas)

Resolving the depth-breadth conundrum

Be honest about the intention of the convening. If fostering trust and relationships, especially across different stakeholders, is the aim, then embrace intimacy and time as important ingredients. To heal gaping holes in understanding or develop empathy takes time. If legitimizing a field is the goal, pack in stories of the possible and expose people to as many potential dance partners as feasible. Know your intention.

There are multiple tactics to a strategy

We learned that building an enabling ecosystem for social innovation benefits from multiple complementary approaches. Convenings are a natural resource that can be molded to both emergent opportunity and long-term strategy. They fuel capacity for innovation and prepare the way for that capacity to drive systems change.

Every gathering starts a journey

Convenings have high potential for generative and emergent outcomes. Hosting a space for different perspectives to collide can lead to longer-term transformation, but the sparks from these collisions benefit from additional fuel in the form of follow-up supports for participants and dissemination of the most valuable insights further and further afield.

Relationships matter

Powerful insights and relationships often develop informally, out of the pressure-cooker of work flow, over the crackling of breaking bread or the "a-ha!" of a shared learning experience. Sharing experiences helps build trust that opens the doors to radical new opportunities.

Scaling deep — Indigenous reconciliation as social innovation

By Raven Lacerte, co-founder of the Moose Hide Campaign, Paul Lacerte, co-founder of the Moose Hide Campaign and Stephen Huddart, president and CEO of the McConnell Foundation

We offer these words with humility and good intentions. We are honoured to have been blessed with the experiences shared here and it is our hope that they may serve as good medicine for you.

Paul Lacerte and Raven Lacerte

Stephen Huddart

Social innovation is not only about scaling up novel approaches to stuck problems. It's also about deeper shifts in culture — changes in fundamental beliefs about who we are, how we got here, and how we relate to one another. It can open us up to different ways of seeing, knowing, and being. It can change relationships, creating bonds of compassion and respect. This kind of social innovation may involve changes in consciousness — a form of what Darcy Riddell, director of strategic learning at the McConnell Foundation, and Michele-Lee Moore, former McConnell fellow in social innovation at SiG@Waterloo, call "scaling deep."[43]

Reconciliation with Indigenous peoples in Canada is an example of working to scale deep. It is historic, urgent and far reaching; it touches us personally and it shapes public policy. Its import will extend into the future for generations.

The Truth and Reconciliation Commission into Residential Schools (TRC) made Canadians acknowledge that their government had perpetrated cultural genocide against Indigenous peoples. This truth has moved Canadians to grieve and to apologize for what was done and to commit to implementing the Commission's 94 Calls to Action.

Against this backdrop, this essay records some personal reflections about the inaugural Indigenous Innovation Summit that took place in November 2015 on Treaty One Territory, at the Winnipeg Art Gallery and the Canadian Museum of Human Rights in Winnipeg, M.B. More than 300 Indigenous and non-Indigenous innovators questioned, listened, learned, and explored new relationships and a new terrain. It was a time when ancient wisdom about innovation was brought into the present and when we glimpsed the shape of a kind of country Indigenous and non-Indigenous peoples could build together.

How it began

Paul Lacerte and Stephen Huddart — met for the first time at the 2014 Social Innovation Exchange (SIX) Summer School in Vancouver, B.C. During the closing session, Paul spoke about eliminating violence against women and children through the Moose Hide campaign he was launching with his daughter Raven. As the Summer School ended, Paul expressed disappointment that a global social innovation network gathering had not included a stronger focus on Indigenous issues. Moreover, he questioned whether social innovation was even relevant to matters such as colonialism, gender-based violence and the intergenerational trauma stemming from the residential school system.

As Paul and Stephen talked it over, the idea of an event focused on Indigenous innovation arose and we agreed to find a way to do it. Paul brought the idea to Jeff Cyr, executive director of the National Association of Friendship Centres, and Stephen enlisted his colleagues at the foundation, including Nicole McDonald, director of Indigenous Initiatives, and the SiG partners. A year later, the list of supporters had grown to include Indigenous organizations, foundations, charities, social enterprises, governments and universities.

Setting the stage

On the evening before the Summit, Paul and Stephen walked onto the stage of the empty theatre at the Winnipeg Art Gallery. They spoke about how grateful they were to be stewards of an idea that was sparked by the SIX Summer School the year before and for the efforts of so many colleagues and partners. Paul offered some advice: that in his opening remarks, Stephen should ask the non-Indigenous participants to approach the event more as listeners and students and less as talkers and teachers. Stephen agreed and the subsequent guidance he provided to all Summit participants created a safe and fertile environment for Indigenous ways of knowing and being to surface and for the Indigenous participants to be truly heard.

In his opening remarks, Elder Dave Courchene — Nii Gaani Aki Inini (Leading Earth Man) — founder of the Turtle Lodge and a member of the Sagkeeng First Nation in Manitoba, spoke about an Anishinaabe prophecy that people of all races will come together with Indigenous Nations to enter an era when spirituality transcends materialism. He said that the people who will lead this work are the *Oshkimaadziig* and he called us by that name, saying, in our emerging learning and relationships, a different future could unfold during this and coming generations.

Raven Lacerte: When the Summit became a ceremony

My name is Raven Lacerte and I am honored to share in my own words the incredible experience I had while presenting about the Moose Hide campaign with my dad at the Indigenous Innovation Summit in Winnipeg. This was my first time travelling to any meeting to represent the Moose Hide campaign and I was very nervous to present in front of a plenary audience with many Indigenous and non-Indigenous leaders. I knew I had to represent myself, my family, and the campaign well. Writing a speech on violence against women and children was very difficult for me because it was so painful and I wanted to make sure that I said exactly what I needed to say about the importance of ending violence against women and children, especially against Indigenous women. Knowing that my dad and I would be on stage together made the whole experience a little less scary.

I remember practising my speech that morning in my hotel room with my dad. We set up the ironing board as my podium and I remember feeling ready because I knew that we had something important to say and that we were coming with good intentions and good hearts. We prayed and asked the Creator to help us to do our best.

At the Summit that day, Senator Murray Sinclair, the incredible man who was the Chief Commissioner for the Truth and Reconciliation Commission, spoke just before me about his work with the Commission and the 94 Calls to Action that came out of the TRC's final report. I was overwhelmed with gratitude for all the work he had done to lift up our people. I was also deeply moved to hear him speak about the impacts of the residential schools on Indigenous peoples and about the trauma and cycles of violence and pain that are being passed down through the generations because of those awful schools.

My mom was a Residential School Survivor. She attended the Lejac Indian Residential School in northern B.C. As I listened to Senator Sinclair, I thought about her. I thought about how her experiences affected me when I was little and what that felt like. I thought about all the violence that came from those schools and about the pain that is still happening today because of the residential schools and colonization. When it was my turn to speak, I stood up tall and told my story. I told my mom's story and my family's story. I spoke about the need for all Canadians to understand where the anger and pain comes from and where we learned these cycles of violence and dysfunction, so we can learn how to undo that damage, to heal, and to move forward together.

As I finished speaking, I decided to sing the women's warrior song because I felt strong and proud like a warrior. I shared that I was taught the song while I paddled on Tribal Journeys, a traditional Indigenous ocean-going canoe journey, where many paddlers travel hundreds of miles from their home communities in B.C. to the host First Nation in Washington State. I sang the women's warrior song and many women in the audience joined in — we were warriors in that moment. We were safe and proud and fierce and free. When I finished the song, I gifted my drum to Senator Sinclair. He had tears in his eyes and he lifted up the drum and showed it to all the people in attendance. It felt like we were in a ceremony. It felt like our ancestors were there with us. It was sacred.

After my dad and I finished our presentation, Senator Sinclair stood up to sing a song to me. He heard me say that I am part of the Bear Clan while introducing myself, so the song he gifted me was the Bear song. He invited anyone in attendance who was a member of the Bear Clan to come to the stage and dance and sing with him. It was a transformative moment for me and very humbling. I watched him sway back and forth and I listened to him sing. I felt like every person in the room was connected with each other and in a state of total unity.

The whole experience is one I will never forget. I was so grateful for all the love and support I received and for the opportunity to meet so many incredible Indigenous and non-Indigenous leaders. I am also deeply grateful for the momentum the

Summit created for the Moose Hide campaign. We need to stop the violence being done to women and children in this country and I feel that the Indigenous Innovation Summit in Winnipeg moved us along that journey in a powerful way.

A pipe ceremony

That evening, there was a public event at the Canadian Museum of Human Rights. Following the video greeting from Governor General David Johnston, the Master of Ceremonies, Wab Kinew, introduced a panel of Indigenous innovators that included Senator Sinclair; Winnipeg Mayor Brian Bowman; former Premier of the Northwest Territories and founder of Canadians for a New Partnership, Stephen Kakfwi; director of the National Centre of Truth and Reconciliation, Ry Moran; the founders of Reconciliation Canada, Chief Robert Joseph and his daughter Karen; and the founder of the 4Rs Youth Movement, Jess Bolduc. Kinew then introduced his uncle, Elder Fred Kelly — Ojibway of Onigaming, Treaty #3 — who told the story of an Anishnaabe pipe that was used at the Great Peace of 1701 in Montreal, Q.C. — a gathering of French settlers and 1,500 Indigenous people from 40 First Nations whose territories spanned the Great Lakes watershed. His remarks evoked an era when settlers and Indigenous peoples were engaged in creating a partnership society. He then removed that very pipe from its case, lit it, and passed it to each of the people on stage.

When innovation systems speak to each other

Across a diverse and extensive Summit agenda, punctuated by ceremony and cultural performances, Indigenous and non-Indigenous approaches to and perspectives on innovation were shared and sometimes woven together. There were sessions on arts and innovation, social finance, intergenerational collaboration, social enterprise, media and much more. There was an ongoing Indigenous solutions lab, hosted by the Winnipeg Boldness Project in collaboration with the MaRS Solutions Lab. There was much joy, many tears and plenty of humour, thanks to our conference facilitators, Tina Keeper, an actor, producer and former Liberal MP

and a member of the Norway House Cree Nation in northern Manitoba; and Waneek Horn-Miller, an Olympic athlete from the Kahnawake Mohawk territory. Throughout the Summit, the reality that innovation is an Indigenous value, embedded in culture and spirituality, was powerfully and beautifully expressed.

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Indigenous and non-Indigenous collaboration around social innovation holds great promise as a source of wisdom and ideas for addressing "stuck problems" — for Indigenous peoples and all Canadians. It represents an opportunity to enlarge our societal values framework from a focus on individual well-being, which dominates contemporary thinking, to a focus on collective well-being and bridging our past and futures, including that of our natural world, our mother earth.

As Senator Sinclair observed at the Summit, "Innovation isn't always about creating new things. Innovation sometimes involves looking back at our old ways and bringing them forward to this new situation."[44] For Indigenous peoples in Canada, this is often described as "decolonization and re-culturalization" and it involves the expression of, and engagement with, Indigenous teaching in innovative projects and strategies.

A subsequent Summit took place in 2016 in Edmonton, Alberta that, in many ways, represented an evolution of the 2015 gathering, attracting many new Indigenous innovators, as well as Minister of Canadian Heritage, Mélanie Joly, who announced an expanded commitment to preserving Indigenous languages. There was no national Summit planned for 2017 but, in conjunction with Montreal's 375th anniversary, the McConnell Foundation supported a special event on September 12 and 13, celebrating Indigenous culture, innovation and the 10th anniversary of the UN Declaration on the Rights of Indigenous Peoples.

Closing reflections

For many who were there, the 2015 Indigenous Innovation Summit marked a turning point when, in the spirit of reconciliation, a group of Indigenous and non-Indigenous social innovators came together to deepen and align their work. Likely everyone who took part could tell their own story of how the Summit affected them and shaped the work and relationships that followed. Certainly, no one who was there will ever forget it.

Paul and Stephen are conscious that they work from positions of power and privilege, with the responsibility and opportunity to advance social justice and economic reconciliation through social innovation. They invite others to join in setting an example, making room for those of Raven's generation and future generations to engage in respectful partnership and, should they be so fortunate, enduring friendship.

Indigenous Innovation Summit 2015 (Photo courtesy of the McConnell Foundation)

Networks: Leaping by learning

There's a real danger in this work, it's easy to become focused on your own organization, listening to your own staff and their work inside the foundation and your own grantees. It's easy to do navel-gazing. The gravitational pull is in that direction. The important opportunity is to engage the broader sector and to learn from them.

—

Blair Dimock, vice-president of partnerships and knowledge at Ontario Trillium Foundation

In her final years, Donella Meadows, a pioneering American environmental scientist and systems analyst, argued that "we can't control systems or figure them out. But we can dance with them!"[45] Her "system wisdoms" summarize a lifetime of insights into how we can poignantly and impactfully engage with the dynamic, complex systems we run into as we work to address entrenched problems in our communities.

The Dance by Donella Meadows[46]

1 Get the beat.

2 Listen to the wisdom of the system.

3 Expose your mental models to the open air.

4 Stay humble. Stay a learner.

5 Honour and protect information.

6 Locate responsibility in the system.

7 Make feedback policies for feedback systems.

8 Pay attention to what is important, not just what is quantifiable.

9 Go for the good of the whole.

10 Expand time horizons.

11 Expand thought horizons.

12 Expand the boundary of caring.

13 Celebrate complexity.

14 Hold fast to the goal of goodness.

In our experience at SiG, many elements of "the dance" are best supported by networks, especially learning networks and communities. Staying a learner and expanding relationships are symbiotic: the opportunity to learn is a powerful hook for network engagement; as network engagement turns to trusting relationships, deeper wells of learning spring up from shared vulnerability.

SiG experimented with multiple forms of networks and learning communities, working to amplify the immense value of continuously fostering connections. By diversifying and deepening relationships through networks, we hoped to seed outcomes that could exert much more power than the sum of their parts. We focused on critical connections, coupled with an "intentional commitment to advance the field of practice and to share those discoveries with a wider audience."[47] We sought to "make [our] resources and knowledge available to anyone, especially those doing related work."[48]

That said, SiG also zeroed in on specific communities of practice within the social innovation community, creating an environment for aligned practitioners to connect deeply around a subject, such as funding systems change, social research and development, and social tech for social change. As we invested in networks to advance these practices, we simultaneously took advantage of opportune moments to make headway in particular sectors and geographies.

4

Seeding the potential for and paying attention to emergent or unexpected opportunities was a central SiG strategy to create a culture of continuous social innovation in Canada — a culture of continuous network recharging and community enrichment that recognizes that relationships are a means and an end in systems change.

Networks of networks (Photo by Geraldine Cahill)

Leaping by learning

Innovation is not invention. Chances are, someone has already thought of, tried, tested, failed, or successfully developed an idea of great use to a community. This reality is the founding principle of Spanish social business UpSocial, which facilitates "the implementation of proven innovations to meet the demand for solutions to social challenges."[49] The growth of solutions platforms globally — from the digital platform Sphaera Solutions to the non-profit organization Grand Challenges Canada — speaks to our growing ability to tap into knowledge anywhere in the world and find approaches with traction and proven effect.

SiG did not host solutions platforms, but we facilitated knowledge mobilization through increasingly broad networks, creating critical learning connection points between global, regional and local networks to share insights on what is working and what isn't. By creating more and more channels to different knowledge and experiences across Canada and the world, SiG could support the likelihood innovators would find allies who could facilitate a leap through learning from existing attempts, failures or successes to solve complex problems.

The wisdom in knowledge

Networks generate new insights, as people find fellow travellers, step over old thresholds, share mistakes and successes, and apply frameworks to their practice. It is through connection that different forms of knowledge — from academic to community insights, from individual to systems learning — unlock new possibilities. This insight both informed SiG's learning programs, and shaped its investment in formal and

informal networks to accelerate the wisdom generated at the intersection of multiple sources and approaches to knowledge. In a 2010 *Harvard Business Review* article, David Weinberger, a senior researcher at Harvard's Berkman Center for Internet & Society, describes the social, contextual reality of knowledge generation:

> [Knowledge] results from a far more complex process that is social, goal-driven, contextual, and culturally bound. We get to knowledge — especially actionable knowledge — by having desires and curiosity, through plotting and play, by being wrong more often than right, by talking with others and forming social bonds, by applying methods and then backing away from them, by calculation and serendipity, by rationality and intuition, by institutional processes and social roles.[50]

At SiG, we paid close attention to the learning born of our network animation, bridging silos and sectors to support knowledge-sharing across diverse social bonds.

Mobilizing resources

One key resource for social innovators is networking. "Networks help facilitate innovations to bridge the seemingly insurmountable chasms of complex problems to create change across scales, thereby increasing resilience,"[51] Frances Westley, J.W. McConnell chair in social innovation at the University of Waterloo, and Michele-Lee Moore, a former McConnell fellow in social innovation at SiG@Waterloo, wrote in their paper "Surmountable Chasms." Similarly, in researching "The Network Secrets of Great Change Agents," a Harvard Business School case study, professors Julie Battilana of Harvard Business School and Tiziana Casciaro of the Rotman School of Business found that "people who bridged disconnected groups and individuals were more effective at implementing dramatic reforms, while those with cohesive networks were better at instituting minor changes."[52]

What these authors identified is the particular value of boundary-spanning connections in networks and communities of practice. These connections expose individuals or organizations to novel information or approaches, introduce new possibilities or frameworks to explain a problem, and nurture trust between and across silos, setting the table for potentially disruptive relationships to drive drastic change. When the moment is right, these relationships are key leverage points to mobilize resources from different spheres of influence into a shared goal.

Using Al Etmanski, a community organizer, as her case study, Westley pointed out how Etmanski "links opportunities with resources, but he does it through people. He hears about an opportunity to partner with the Law Society, or he gets access to a government minister through intermediaries — people who give him helping hands, become part of his network. If he were just sitting there all alone, he wouldn't hear about these things. When you watch social and institutional entrepreneurs, they are operating through relationships almost entirely and so they absolutely need those relationships to make whatever they are making work. But it's a two-way street, as relationships always are. So, you need other intermediary organizations and people who are prepared to make the connections and open the doors that allow someone like Al to match his good idea with opportunity. It is very dependent on that."

Through our decade of activity, SiG tried to serve as this intermediary organization, opening doors and matching ideas to opportunities. This was an important element of

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our networking style and was not without critique as it created the appearance of — and sometimes the reality of — elite access or attention to certain groups over others. Our intention, however, was to match ideas to ripe opportunities as they emerged and came to our attention.

The Blue Marble

> **The birth of the modern environmental movement, and even the possibility of global consciousness, could be tied in effect to us seeing spaceship Earth, the fragility of our systems, and the vulnerability of humanity and all life…**
> **—Darcy Riddell, director of strategic learning at the McConnell Foundation**

THIS IS OFTEN CALLED SYSTEM MAPPING. IT CAN BE DONE FORMALLY OR INFORMALLY.

Fostering and expanding networks helps an ecosystem see itself as a whole. Individuals working on a complex problem can only ever see and represent one version of events, but by reaching out broadly to other individuals and groups to exchange knowledge, experiences and worldviews, it is possible to develop a dynamic vision of the whole. The result is the social equivalent of our first image of Earth from space — as we see the whole, there is a sudden shift in consciousness around our inherent interconnectedness. Being aware of the whole ecosystem gives everyone greater insights to understand who (and why) to engage to move closer to systemic impact.

Earth from space (Photo courtesy of NASA)

Diverse and deep connections help us to not only see our dance partners more clearly, but also to understand the problem in its complexity. Here, again, diversity is the critical ingredient. It is through this prism that a complex problem is seen in a new light. This was Melissa Herman's experience during her term as an Alberta Social Innovation Connect Fellow in Fort McMurray, Alberta, starting in the summer of 2015. As a woman Indigenous to Treaty 8 territory, Herman reflected how culture illuminated her understanding of social innovation at a fundamental level:

> **I was told that when you pass someone tobacco in thanks for a prayer, there is a spark that signals the Creator of a coming together. This is my understanding of social innovation now. Every time we connect in efforts to empower, enlighten, engage, enhance, appreciate, share or grow, there is a spark that has the capability of changing the world. And even if it doesn't, at least we know that if we keep sharing and reaching out to each other, that perhaps that spark might spark the mind of those who will change the world. —Melissa Herman, ABSI Connect Northern Fellow**

Licence to innovate

Another rich opportunity leveraged through networks is the introduction to role models, stories and examples similar enough to inspire confidence and the social licence to continue trying to shift a system. As one respondent to a 2017 SiG survey reflected, "it wasn't until after my interactions with SiG that I realized I could become a more effective changemaker by building on the academic and practice knowledge that existed. Had it not been for this belief I am not sure I would have felt confident in applying social innovation principles at an institution as big and complex as [mine]."[53]

Legitimizing social innovation frameworks and processes by connecting people to relevant examples and case studies became a key pillar of SiG's work, creating tremendous learning around communicating social innovation and the power of positive storytelling. As Tim Draimin, SiG National's executive director, succinctly explained, "learning systems, informal learning systems, accelerate the dissemination and diffusion of key knowledge [and] allow people to build personal relationships, which is the oil that lubricates how systems work well or don't work very well." At SiG, we aspired to fuel a culture of permission and empowerment to work on alternative systems that better address our contemporary challenges.

Resilient networks share the learning journey

Inspired by the announcement of a $1-billion Social Innovation Endowment Fund by the Government of Alberta in 2014, a cross-sector alliance of Albertan organizations came together to explore the question: "How do we put social innovation to work in Alberta?"[54] When global pressures and internal political divisions resulted in the endowment's cancellation later that same year, the question continued to drive collective discussion in major urban centres in the province. Though the fund was gone, enough momentum around the possibilities and pitfalls of social innovation had built up amongst Albertan social impact organizations, businesses, and initiatives, as well as government, philanthropic foundations, and academia for work developing the field to continue.

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The Government of Alberta started the journey with a mapping exercise of the social innovation ecosystem in 2014, publishing their findings in September 2015. Community convenings were held concurrently, funded by Suncor Energy Foundation and Trico Charitable Foundation, with dialogues in Edmonton, Calgary and Red Deer facilitated by Terry Rock of Rock Strategy and Leadership and Tim Draimin.

Out of these community convenings and mapping exercises, the Alberta Social Innovation (ABSI) Connect Fellows initiative was born with a mandate to rigorously explore the nature of and opportunity for social innovation in Alberta. SiG National volunteered to backbone the initiative, fulfilling the role of administrator and facilitator for the fellows so they could be institutionally agnostic; without a specific organizational affiliation, they were welcomed across sectors and their insights respected as an offering to all.

Over the course of two years, the fellows were tasked to answer the question: "Who is working on transformational social and/or environmental change in Alberta and how?" The fellows committed to a community-led grassroots approach to knowledge generation and pattern finding, as well as to a principle of democratizing their journey — turning their insights into actionable knowledge as quickly as possible for the benefit of Alberta's social innovation field. The fellows invited participants of the community convenings to share their story and perspectives on social innovation. Their simple, but powerful invitation was, "Can we learn with you?"

Openly sharing a provincial learning journey on social innovation helped spread the licence and capacity to lead and host network building across Alberta, enabling the social innovation movement to adapt to ebbs and flows of change: the cancellation of the endowment fund, the collapse in oil prices, change in government, a new focus on climate action, and a renewed push for reconciliation. As a respondent to the SiG 2017 survey pointed out, "SiG's support of ABSI Connect and Alberta-based fellows enabled community to continue this work when government stepped back. Due to ABSI Connect and SiG's work here, we have a foundation of research and a well-connected group of folks to build from."[55]

The role of various learning community facilitators between 2014 and 2017 cannot be overstated. From the development of the fund through to the ABSI Connect Fellows, there was one or multiple change agents facilitating a shared and pan-provincial field building process — first, the provincial government, then Terry Rock, SiG, Suncor Energy Foundation, and Trico, followed by the ABSI Connect Fellows. All the while, seminal work was being facilitated and shared through local academic institutions, including the Institute for Community Prosperity at Mount Royal University, and local communities of practice, such as the Social Innovation Network Calgary, the Systemic Design Exchange (SDX) and the ThinkJar Collective.

The fellows in particular were privileged with the time, space and support to serve the social innovation community at a provincial level. They further exemplified and put into practice a central SiG learning about serving an ecosystem as a whole: the specific skillsets and capacities required to do this well — to truly be in service of the good of a whole — can be learned, cultivated, supported and spread.

Help wanted: network facilitators

I do think you can train someone to be inventive, to be an institutional entrepreneur. You can train people to help create the conditions where those ideas thrive. I think there are many more of us who are good at that and can get trained to become better at it. —Frances Westley

Most social innovators don't have time to develop or leverage their networks to mobilize knowledge to the depth and scale they need. Intentional facilitators or hosts of networked learning benefit the broadest networks and the smallest groups. It's a skillset that is <u>cross-scale</u> in its attention and impact.

← *FOR EXAMPLE LOCAL, NATIONAL, GLOBAL!*

In "Surmountable Chasms," Frances Westley and Michele-Lee Moore conclude that "network theory helps to explain the types of relationships needed for social innovation to spread across boundaries and systems, which at times may lead to tipping points. However, the mere presence of a network does not ensure this, and it cannot be assumed that diffusion will be the most appropriate means to cross boundary barriers. For networks to do this effectively, they need to be animated by both inventors and institutional entrepreneurs. Once animated, the networks become a powerful force for connection and dissemination."[56]

Skilled individuals — those Westley and Moore call "institutional entrepreneurs" — are needed to turn networks into a powerful force for learning and action. These individuals help with "pattern generation, relationship building and brokering, knowledge and resource brokering, and network recharging."[57] The role is similar to "system entrepreneurs," who Westley describes in a *Stanford Social Innovation Review* article as "responsible for finding the opportunities to leverage innovative ideas for much greater system impact."[58] Simply put, these skilled individuals are facilitators in service to a network as whole, helping foster generative value and impact.

Uncovering the specific capacities and skillsets of impactful network facilitators — from the theory of Moore and Westley and the lived experience of the SiG partnership — enriched SiG's understanding on how to nurture networks of social innovation in Canada. This included but was not limited to Alberta, with the ABSI Connect Fellows, and British Columbia, with B.C. Partners for Social Impact, a multi-partner initiative born from the 2011 B.C. Premier's Social innovation Council's "Action Plan Recommendations to Maximize Social Innovation in British Columbia." At the intersection of theory and practice, we learned about the capacities and skills critical to turning the diversity and creativity of a network into action.

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Skills of Network Facilitators

Moore and Westley

✳ Pattern generation and recognition

✳ Span boundaries with relationship building and brokering

✳ Broker or mobilize knowledge, resources or power

✳ Revitalize energy

✳ Recharge the network

✳ Keep alive a strategic focus

ABSI Way of Working

✳ Learn through deep listening, experience and emergence

✳ Work comfortably in uncertainty

✳ Bridge and broker new relationships and partnerships

✳ Host diverse perspectives with empathy

✳ Connect and collaborate with diverse stakeholders

✳ Work with institutional agnosticism

* Democratize the journey
* Discover and amplify stories for unheard success
* Serve the social innovation ecosystem as a whole

B.C. Partners for Social Impact

* Identify new opportunities and emerging gaps in the social finance/social innovation landscape, including expanding available Social Innovation financing
* Work across all sectors and disciplines to ensure the implementation of the B.C. Social Innovation Council's recommendations
* Engage and coordinate the collective and independent work of social innovators and social entrepreneurs in B.C.
* Leverage personal networks with elected officials to create a policy opening and help massage it to overcome inevitable barriers the system throws up
* Pay particular attention to supporting youth and Aboriginal entrepreneurs and innovators

The garden is awake

[The ABSI Connect Fellows] have also surfaced cultural, public policy and systems-level issues that need to be addressed in order to support transformative community change and shared prosperity in these difficult times. Implicit in this, is a challenge to those of us who support the innovation ecosystem — government, philanthropic foundations, corporate community investors, consultants and post-secondary institutions — to be better connected to the grassroots, i.e. to empathize with and support the actual innovators working on the ground to make this province a better place for us all to live and thrive.
—James Stauch, director of the Institute for Community Prosperity at Mount Royal University

Impactful networks are enriched with symbiotic relationships, diversity, adaptive capacity and attention to allow room for growth from unexpected places. They benefit from facilitators who humbly help tend the conditions for social innovation to thrive — considering when and how to cross-pollinate ideas, when to step back and reflect on the state of the whole network, and how to be grounded in rich soil supporting the grassroots. Humble, skilled facilitators are essential for the networks to bear the fruit of action.

Jardins Gamelin (Photo courtesy of the McConnell Foundation)

Alberta CoLab presents at Skills Society Action Lab
(Photo courtesy of Skills Society Action Lab)

Focus on critical connections

We focused on facilitating both strategic and opportune relationships when a shift in context, opportunity or readiness opened up the possibility for new forms of knowledge generation or collaborative action. This demanded a commitment to serving as a neutral broker, to the best of our ability, and paying close attention to emergent patterns and trends, so we could turn windows of opportunities into open floodgates for action.

Help people find their dance partners

At the same time, we sought to expand networks and help more people see the ecosystem they operated in more clearly. Facilitating outreach across diverse individuals and groups to exchange knowledge, experiences and worldviews was a way of creating the conditions for future opportunities.

This is a learnable skill

The specific skillsets and capacities that help animate actionable knowledge and relationships in a network can be learned, cultivated, supported and spread:

* Energize a strategic focus on a sector-agnostic culture of social innovation
* Watch for opportunities, trends, approaches and challenges across the country and regionally
* Broker relationships to span boundaries, silos and cultures
* Mobilize knowledge, resources and power both strategically and openly
* Share stories to inspire and inform with examples from Canada and around the world

2017 Suncor Gathering (Photo courtesy of Suncor Energy Foundation)

Synergies and shared learning on SiG and SIX

By Louise Pulford, director of the Social Innovation Exchange (SIX) and Tim Draimin, executive director, SiG National

Louise Pulford

Tim Draimin

In spite of current ads and slogans, the world doesn't change one person at a time. It changes as networks of relationships form among people who discover they share a common cause and vision of what's possible. — Margaret Wheatley and Deborah Frieze "Using Emergence to take Social Innovations to Scale" (2006)[59]

Social Innovation Exchange (SIX) and Social Innovation Generation (SiG) were both created to support and enable a social innovation ecosystem. SIX had a global mandate, while SiG was envisaged as a Canadian platform, but the organizations share several important similarities and challenges in their approaches.

SIX and SiG were born of a recognition that the impact potential of individual social-change organizations frequently depends on the robustness of the enabling ecosystem they operate in:

✳ Because social innovation is a relatively new expanding field, supporting shared learning is a valuable way of accelerating how readily deployable insights are developed, scaled and spread;

✳ Because innovations often happen simultaneously in different locales, networks can help innovators become visible outside their own silos to find each more easily and learn from each more readily;

✳ Networks can support activities that assist members in building quality relationships, facilitating sharing norms and practical member exchange and mutual support.

SIX

SIX was conceived as a network of networks, whose role was to:

Build a global community of social innovators by putting them in touch with each other and with those who have the power and resources to make things happen; fostering sharing and learning; avoiding re-invention of the wheel; and providing inspiration and legitimacy to the world of social innovation.

Become a first stop shop for social innovation by defining and developing processes, methods and tools to help understand how social innovation works.

Get social innovation on the public agenda by working with governments, businesses, academics, funders, practitioners, and leading social innovation intermediaries to accelerate the field of social innovation around the world. By linking community innovators across sectors, fields and geographies, SIX aims to spread the most effective models more quickly.

Function as a nervous system for the global social innovation field by focusing on capacity-building, building leaders networks, and convening people.

SIX is an open, informal and fluid community that appeals to people and organizations across sectors, and across SIX-involved continents. It boasts a tight Secretariat, a series of regional and thematic network nodes, a global council of organizations that leads SIX's content and supports the Secretariat financially, and a global board of leading social innovation practitioners and thinkers that guides its strategy.

SiG

SiG was conceived to operate with several purposes:

Individual partner-led asset building: A diverse and geographically distributed partnership — embracing a charitable foundation, a new urban innovation hub started by business leaders and civic entrepreneurs, an academic institution, and an innovative charity — that could create or help catalyze critical missing ecosystem assets. Those assets included accelerator programs, educational training and research on cracking the code of social innovation, support for success of ventures to make social and economic impact, new philanthropic programs supporting innovators in different stages of the innovation cycle, regional ecosystem and network building efforts to build multi-sector collaboration and enabling policy change, and awareness raising and public education.

SIX Summer School 2014 Opening Plenary (Photo by Komal Minhas)

Collaborative efforts: All partners would link their capabilities to create impact that is greater than the sum of their parts. These included convening the Canadian Task Force on Social Finance, thought leadership engaging all sectors, public policy and support for events convening the nascent social innovator community across sectors.

SiG's network approach was based on a core partnership of four organizations, which in turn connect to and leverage opportunities to partner with larger networks (e.g. regional networks in different cities and provinces, mainstream innovation networks, philanthropic networks, multi-sectoral networks such as Public Policy Forum). At the same time, SiG recognized that learning from counterparts worldwide could allow it to leapfrog stages of learning others had already covered.

A shared approach

SIX and SiG have always shared key aspects in their approach:

1. Strategic foresight

To function effectively and continue to be useful to our members, we must remain relevant and current, providing strategic foresight by:

» Continuously seeking out and leveraging strategic opportunities and connections;

» Thinking and doing: connect to policy and power, but also practice;

» Recognizing the global breadth of knowledge and a desire to help people avoid reinventing-the-wheel. Both groups want to support practitioners to leapfrog ahead by borrowing great proven ideas and adapting them to local circumstances;

» Horizon-scanning secretariats — always on the lookout for new people and projects to link to an ecosystem that is more than the sum of its parts;

» Continuously seeking to identify topics and themes that bring value to where the community is at and the current and future challenges it faces.

SIX Wayfinder 2017 (Photo courtesy of SIX)

In February 2017, SIX organized a major curated event to equip the global community with strategic thinking for the next 10 years. SIX Wayfinder brought together 160 leaders from more than 34 countries and was hosted by U.K. innovation foundation Nesta and supported by the United Nations Development Programme (UNDP), Social Innovation Generation (SiG) National, The Australian Centre for Social Innovation (TACSI), and the McConnell Foundation. Wayfinder looked back to look forward, asking attendees to:

  » **Reflect** on the current state of the field and the context it operated in;

  » **Explore** how we could become more than the sum of our parts; and

  » **Define** what we, as a community, should aim to achieve by 2027.

2. Strategic curation
We must intentionally shape a curation approach and strategy direction:

  » We both have strong secretariats supporting core functions such as information sharing, networking, building strong peer relationships, knowledge-building, strengthening the distributed capability of the network to have agency;

  » Developing and deploying specific strategies built around goals such as capacity-building, policy engagement, and field building;

  » Growing slowly, and organically, inviting people to be a part of it explicitly to build a strong core foundation — SIX and SiG each took 10 years to build the networks they have today;

  » Encouraging distributed leadership across the breadth of networks we serve;

  » Taking advantage of new technology to be able to support peer-to-peer connections and collaborative value creation.

From 2009 to 2014, SIX used Cisco's Telepresence technology to host 40 online conversations, each involving up to eight cities globally. These sessions discussed a wide variety of issues important to our networks and the field, and facilitated the exchange of learning on topics such as social impact bonds and corporate social innovation. SiG borrowed from this idea to develop the Policy Innovation Telepresence series with Cisco.

3. Trust building
Neither of us are associational membership organizations, instead we rely on the power of pull to keep people and institutions connected with and active in supporting network activities:

  » For organizations in more isolated parts of the world, such as Australia, or for individuals, being part of SIX provides an identity;

  » This relates in part to brand, each of us is able to open more doors and build more bridges if we have a recognizable and trustworthy brand; but it is also about the quality of the individual relationships we are able to nurture and develop; especially valuable if these are boundary-crossing.

4. The partnership imperative
All activities — every event, every paper/research piece — are conducted in partnership. Networks never act alone:

  » In SiG's case, we are glad to step back to allow local activity partners to see themselves as ecosystem builders;

  » In SIX's case, we work closely with a partner, building their capacity to work using a networked approach and allowing them to position themselves as global leaders.

⑤ A cocktail for reciprocity

As conveners, we never forget where the initial connections come from. They are always reciprocal, layered, and never one-sided:

» That is how SIX now has 15,000-plus people around the world connected to the networks, and a core of a few thousand that regularly attend events or are in regular contact;

» That is how SiG developed a broad-based net-work of partners and collaborators in the social sector, business, academia and public sector as well across Canada's diverse regions.

⑥ Building a brand

For both SiG and SIX, we were challenged to develop a powerful and viral narrative that would make it sim-pler to explain to people in the mainstream what ex-actly "social innovation" is and why it is so important:

» The way each SiG partner (McConnell, MaRS, PLAN, Waterloo) used the brand (e.g. SiG@ Waterloo) helped to increase the visibility of the network (and its perceived influence), which in turn made it easier to access hard-to-reach individuals;

» To begin with, SIX used the Young Foundation brand, as well as the founders and board mem-bers to reach organizations that would be harder to connect with;

Shared challenges

We have numerous shared challenges as field-building platforms. They include:

1. Ensuring network sustainability: What is the right business model for a network?

» SiG has been fortunate to have garnered direct philanthropic and government contract support. In turn its collaborative activities have attracted grants. But as SiG converses with a much broader network about a next generation Canadian en-abling platform there will clearly be the need for a diversified funding model to support it, as well

as finding new ways of imagining how place-based, distributed and virtual systems can sync and flourish.

» SIX had the operational support of the Young Foundation for its first four years, but after becoming independent in 2013, it needed to find a business model to support activities. That model came in the form of fee-for-service work, contracts with the European Commis-sion, grants, and event fees, but finding core support to nurture the network will always be a challenge. Funding core growth remains a challenge.

2. Operating at the periphery of the mainstream innovation system: How do we get social into the water supply?

» The dominant global thinking and organization of innovation policy and innovation ecosys-tems is centred on STEM (science, tech-nology, engineering and mathematics) and business-model innovation. Too often, social innovation is invisible to the main innovation system and operates in a silo. Challenging the dominant narrative remains a daunting but in-dispensable task if social innovation is to have the impact it seeks.

» SIX and SiG embraced a core tenet to work across all sectors, reinforcing that social innovations happen in every sector and that high-impact innovations span sectoral boundaries.

» Public policy change is a prominent part of the mainstreaming strategy.

Examples are:

» One success story in this regard is SIX's work with the European Commission to get so-cial innovation included alongside technical innovation for the first time in their Innovation Union strategy in 2011. As a result, hundreds of thousands of Euros have been directed to support social innovation research and exper-imentation.

» One Canadian watershed advance is that the federal government under Prime Minister Justin Trudeau mandated a public policy process, led by Jean-Yves Duclos, the Minister of Employment and Social Development Canada, to create a Social Innovation and Social Finance Strategy Co-Creation Steering Group to develop a policy agenda.

3. Power of weak ties: How should we manage the tension of depth vs breadth?

» Weak ties, versus strong ties, enable people and organizations to reach a large number of diverse but relevant contacts for knowledge or action. There are always trade-offs between size vs depth, openness vs building a core of like-minded people.

» SIX has shifted its approach towards weak ties. When SIX began, we focused on small, more exclusive, invite only events, which built a strong core — our summer schools typically hosted 80 people. In 2014, during the SIX Summer School in Canada, SiG challenged SIX to include more participants. We hosted 150 people during the summer school, and developed a set of additional activities for local people which formed Vancouver's Social Innovation Week. This enabled us to grow the network, and therefore the profile of social innovation, significantly.

Networks of the future

While SiG and SIX base their networks around technology platforms (e.g. robust websites, a knowledge hub for SiG, a global Cisco Telepresence network SIX used for six years), neither is inherently technology-focused. Both organizations were established before Twitter was invented and before social media was widely used, and we didn't maintain portals for online interaction.

Both our platforms are staffed secretariats. We could do more if we were more robust digitally. Much more robust platform development would provide opportunity for the growth of similar networks by harnessing the distributed knowledge of peers around the world in more effective and ongoing ways.

Canadian Social Innovation future gathering (Photo by Volker Hann)

FLOURISH

Experimentation: Innovation is ahead of the evidence curve

When I started in the Netherlands in the late '90s [at Kennisland], we actually started out as a traditional think tank doing some research, writing a report and giving recommendations to government about how they should change policy. We quickly found out that, with the complex challenges of modern society, that is actually an old model that no longer works, for two reasons: one, it assumes that there is actually a blueprint solution that you can find through academic research and you just need to implement it; and secondly, it presupposes that government can solve all the problems. And we, of course, know that both are wrong and we, very practically, without actually knowing a method, in the late '90s and early 2000s, started to experiment, "okay what are other ways to tackle those complex challenges that we face as society?"

—

Joeri van den Steenhoven, former director of the MaRS Solutions Lab

Experimentation — often introduced in elementary school science curriculum — follows the scientific method: Develop a hypothesis, control for variability and run tests until you can disprove, or prove, it. "It is based in a falsificationist philosophy and paradigm: you're going to come up with a hypothesis, make it explicit and then do everything you can to disprove it," Dr. Alex Ryan, vice-president of systems innovation and director of the MaRS Solutions Lab, explained.

A very different expression of experimentation informs social innovators who work in the complex messiness of daily life. "The mindset of experimentation [in innovation] is the opposite of the scientific method; it's not about falsification, it's about taking a crazy idea and proving that it's possible, when it has never existed before. Roger Martin, former dean at the Rotman School of Management, says that the two most dangerous words for innovation are 'prove' and 'it' because, if it's truly innovative, by definition you can't prove it," Ryan said.

In the realm of complex social and environmental problems, innovators work in the muck of uncertainty, trying to get somewhere. There is an initial vision, or hypothesis, but rather than proving or disproving it, experimentation offers new insights that mature or shift the vision; new pathways are revealed in directions we didn't know could exist.

This is why developmental evaluator Mark Cabaj contends, "innovation is ahead of the evidence curve."[60] Experimentation is a critical part of the innovation process, often revealing early evidence that is used to pivot and try again. This form of experimentation is tantamount to what Frances Westley, J.W. McConnell chair in social innovation at the University of Waterloo, describes as a continuous capacity, rather than a repeatable linear process. "We need innovative solutions that take into account the complexity of the problems and then foster solutions that permit our systems to learn, adapt, and occasionally transform without collapsing. More importantly, we need to build the capacity to find such solutions over and over again," she said.

Turning uncertainty into risk

In the past 15 to 20 years, multiple parallel efforts have been made to understand what constitutes a strong capacity for experimentation, when the aim is systems change. Each draws on different intellectual traditions and theories of change, but all take an interdisciplinary approach: bringing the best elements together to address the unique complexity and scale of social and environmental problems today. Westley refers to this process as "bricolage" — the co-mingling of available resources, such as whole systems processes and design thinking, to get to radical combinations.[61]

← BORROWED FROM THE FRENCH TERM "TINKERING" OR "DIY"

For decades, whole systems approaches brought the disciplines of group dynamics, psychology, process facilitation and complexity theory together to design interventions with a whole system, recognizing that complex problems could not be solved by any single organization.[62] These facilitated collaboration processes emerged from three assumptions: we are all connected; control must give way to appreciation, influence and power sharing; and the most powerful change comes from focusing on shared positive futures.[63] What was missing was a focus on innovation, which, conversely, was central to design thinking. In the second half of the 20th century, design thinking developed and matured processes focused on the co-creation of solutions with diverse stakeholders, while leveraging rapid prototyping and continual learning to create an innovation.

← TESTING A CONCEPT OR MODEL IN CONTEXT

Co-mingling whole systems and design approaches produced a hybrid experimentation model called a social innovation lab, an approach to innovating systems interventions for complex problems. Multiple social innovation lab models — all with experimentation as a central capacity — are being tested across the country.

> **If you give us space for experimentation, if we create a sandbox, if we ideate, if we bring ideas — and start bringing them to life, we can create data. That's what I think of when I think of prototyping … it's a great way to take uncertainty and convert it into risk. And then, large organizations, like governments, are great at dealing with risk; they have risk-management practices, but if you can't calculate the frequency, the likelihood of something happening, you can't calculate a risk. —Alex Ryan**

Experimentation is the only way to get feedback on how ideas manifest in life; to more safely account for unknown consequences; and to rapidly gain more information on a problem and any initial solutions. It provides the capacity to turn uncertainty into risk and evaluate it with the people most at risk. It allows innovators to build off of a rich field of experience in combination with learning by doing.

SiG was an experiment supporting experimentation

> **It's a bit of a mug's game. Where can you point to a policy or practice SiG directly changed? That's probably not it's strength. It's strength though was in creating a mindset and, I would say, the permission inside organizations to experiment and fail, understanding what type of culture fosters innovation. —John Cawley, vice president of the McConnell Foundation**

In his 2014 evaluation of the SiG partnership, Mark Cabaj noted that, each SiG node was a sandbox for testing out new approaches to encourage social innovation and create permission for experimentation for social impact. WISIR developed and tested its unique Rockefeller Foundation-funded Social Innovation Lab; Al Etmanski helped develop a Systems Change Co-Lab in British Columbia; McConnell commissioned a write-up of the change lab experience of Reos Partners, a leading consultancy on change labs, and invested in the Sustainability Transition Lab by The Natural Step Canada, the Winnipeg Boldness Project in Manitoba, WellAhead in B.C. and Alberta, and InWithForward in B.C.; MaRS became the home of MaRS Solutions Labs; and SiG National researched and promoted the lab field across Canada and globally.

CHECK OUT THE 2012 PAPER "CHANGE LAB/ DESIGN LAB FOR SOCIAL INNOVATION" ONLINE TO LEARN MORE ABOUT DIFFERENT KINDS OF LABS!

MaRS Solutions Lab, in particular, was an outcome of joint research and promotion of labs by the entire SiG partnership, substantial systems analysis on the range of lab forms, and the critical support of MaRS founder Dr. John Evans. Working closely with Tim Brodhead, former president of the McConnell Foundation, and Allyson Hewitt, director of SiG@MaRS, the Evans Family Foundation provided the first $10-million investment in the lab, strategically positioning it to advance experimentation in a truly cross-sectoral manner.

> **First of all, [SiG is] a field builder and a pioneer that was — not so much riding the wave — but almost preparing the wave and clearing the pathway for initiatives like MaRS Solutions Lab. They made early introductions — introduced**

me to key stakeholders. But SiG also made them interested in the work that Solutions Lab was doing and I think [that] is one of the core roles that SiG played over the years, making foundations, governments, non-profits and even corporate Canada interested in the notion of social innovation and the people that are working in that field.
—Joeri van den Steenhoven

Labs have taken off in Canada, with an increasing number of them blossoming across sectors, especially in government. While many government labs were started to innovate internal processes, increasingly they are reaching out to work with outside stakeholders and partners.

OVER 18 AND RISING IN THE FEDERAL GOVERNMENT ALONE IN 2017.

The quick uptake of lab models has drawn mixed reviews. For any institution working on complex problems, labs have become a vehicle for spreading the value of experimentation; however, they have also served to intensify the hype around process design, instead of systems change. Despite the hype, "having a diversity of labs is a good thing," Ryan argued. "There is a danger that it's seen as a fad, but the bigger danger is that we discourage experimentation. There are so many ways to improve how we develop policy. How might we consider more complexity and more perspectives and faster than the traditional policy development cycle? All of this blooming of 1,000 labs is something to be encouraged. Apply the evolutionary lens to that: it's creating a source of diversity and applying selection pressure that can be further developed to improve the next generation of labs and have greater impact," he added.

IT CAN BE EASY TO GET SIDE-TRACKED FROM THE GOAL OF A LAB BY THE RAD TOOLS DEVELOPED TO HELP FACILITATE THE PROCESS.

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Winnipeg Boldness Project
(Photo courtesy of the McConnell Foundation)

World Wildlife Foundation Hearing Project
(Photo courtesy of the McConnell Foundation)

Social R&D

Experimentation is accelerating in the social sector, as non-profit and charitable organizations look to adapt their approaches to better address the root causes of the problems they exist to respond to. Between 2015–17, a national community of practice committed to cultivating and sharing front-line approaches to experimentation emerged under the banner of social R&D. Stewarded by SiG fellows Vinod Rajasekaran and Jason Pearman, this community of practice continues to mature and advance "the art and science of applying research and experimental processes on the frontline to generate new knowledge and new innovations that transform lives."[64]

"The continuous generation of high-quality social innovations requires high-quality social R&D infrastructure in organizations, including a strong suite of talent, tools and resources," Rajasekaran said. The urgent opportunity in 2018 and beyond will be to mainstream the capacity for social sector organizations and initiatives to pursue research and development with the same rigor and legitimacy as any other sector.

Do it, do it well

The rich culture of innovation spreading into initiatives dedicated to systems change may seem amorphous, with different social innovation lab methods and practices in play, as well as social R&D and other approaches altogether. Yet, what is happening in Canada is ongoing experimentation to improve both learning and action — to move closer towards systems-changing interventions.

As more organizations begin to share a vision of transformative change, a common set of principles are critical to impactful and ongoing experimentation in systems change. Those include:

✳ **1 Diversity is the rule, not the exception**

> **Part of building resilience in complex systems is strengthening cultures of innovation. These are cultures that value diversity, because as any bricoleur knows, the more (and more different) the parts, the greater the possibility of new and radical combinations. But these cultures also need to encourage the kind of communication and engagement that allows disparate elements to meet and mingle, and that allows for experimentation and support rather than blame. Such cultures support social innovation, and social innovation in turn builds resilience. —Frances Westley[65]**

WITHOUT THE MOST VULNERABLE STAKEHOLDERS INVOLVED, A LAB CAN MISS THE MARK ALTOGETHER, CREATING LITTLE, NO OR NEGATIVE IMPACT

While diversity, engagement and trust are essential to experimentation, "marginalized voices are the greatest stakeholders of change and often the most experienced collaborators, with hard-won insights on how to work through vulnerability towards resilience," Westley noted at the SIX Summer School in 2014.

In the language of labs and design, experimentation in social innovation can start to sound like an expertise, developed in isolation and applied on a target population. But it is necessarily a co-creative process, empowered by different lived experiences

combined with facilitation, analysis and fresh perspective to see the multiple facets of a complex challenge.

> **It feels like lots of things: collegial, optimistic, hopeful, supportive, frustrating. Trying to translate and find common language is time consuming. But you're sailing when you find a common agenda. —Diane Roussin, project director of Winnipeg Boldness**[66]

Diversity is not only cultural, linguistic or geographic, there are also diverse disciplines, skillsets, sectors and theories of change. For example, some changemakers in Canada argue there is a blind spot in regards to technology. Digital strategist and Ashoka fellow Anil Patel pointed to the potential waves of social disruption enabled or resolved by technology innovators and he recommended institutions, such as foundations, to place some big bets on the combination of social innovation approaches and technology. "There's so many insights in traditional banking, fintech especially, and the bets they're making," Patel said. "We can take these pieces and combine it into our work."

THE REAL OR PERCEIVED DIVIDE BETWEEN SOCIAL AND TECHNOLOGICAL INNOVATION REMAINS A CRITICAL CHALLENGE & OPPORTUNITY SPACE

✳ 2 You have two ears, two eyes and one mouth: Use them proportionately

Innovation is evolutionary. It demands observation, understanding and adjustment to ensure a solution is both the "fittest" and the "best fit." To do this, some organizations are embedding the capacity for continuous applied learning through new roles. For example, WellAhead, an initiative of the McConnell Foundation that is co-funded in B.C. by the Community Action Initiative, introduced a knowledge manager role to help advance their mission of integrating social and emotional well-being into K-12 education. The manager's role — to "collect data, analyze, and lead developmental evaluation conversations" — is essential to WellAhead's ability to meet three goals: Understand what works and why; build capacity and connection; influence policy and practice.[67]

When a playbook calls for starting with an informed hunch and a readiness to adjust based on how wrong it is, there isn't much luxury to be precious. Instead, the focus must be on celebrating responsiveness, critical reflection, transparency and trust to move forward.

IF THERE WAS A SOCIAL INNOVATION "PLAYBOOK"

> **Whereas if you think of biological evolution as a form of experimentation … it's about massively parallel real world feedback and then the simple algorithm: generate a source of variation, apply selection pressure and then amplify what works and discard things that don't work; and iterate — do that over and over again. —Alex Ryan**

Alberta's Energy Futures Lab (EFL), a collaboration between an environmental non-profit, an environmental think tank, a learning centre, a provincial government, and an energy corporation, started with a question: How can Alberta's leadership position in today's energy system serve as a platform for transitioning to the energy system the future needs?[68] Openness and being responsive to feedback was critical as the lab support team worked to engage a cohort of fellows from a diverse cross-section of Alberta's energy system.

Even during their first workshop, as they were generating project ideas with the first cohort of fellows, the support team realized it had to adapt its strategy. "[The

fellows] weren't going to put up with three days of big picture thinking," Chad Park, director of the Energy Futures Lab, recalled. "Right in the first workshop... [we] hosted an open space and set the frame, 'Now you've got an impressive group of colleagues here from a whole bunch of different backgrounds, who are also interested in working on energy transition issues, what would you like to do with them?' It was as simple as that. Try something quick. Understand the system. Learn and adapt."

This pattern became the norm for the lab: listen, do, learn, adapt, listen again. Having successfully brought together corporations, government, non-profits, First Nations and academia, the opportunity and challenge for the lab support team was to harness that diversity into a shared cycle of idea generation, prototype, and iteration, driven by a co-developed vision that drove the innovation process. It both required and benefited from rigorous and continuous feedback loops.

✳ 3 Adaptation precludes adaptability

Dynamism — constant shift and change — is a feature of complex social and environmental challenges. To find pathways forward changemakers must be able to innovate known solutions, as well as continuously explore new ones in response to changing conditions.

> When you lose the notion of continuous iteration, testing, adapting, scaling, I think you actually lose some of the power of the work itself. I always loved that SiG was about creating a culture of that ... the space to ask "What about this? Or how about this? What if we did this?" I think that when it started, that's exactly what SiG set out to do — and I think that it was super useful. —Anita Abraham, former manager of knowledge mobilization at SiG@Waterloo

Frances Westley often noted that "social Innovation is not a fixed address,"[69] referring to the reality that any successful intervention of a complex problem will require iteration or transformation as the problem shifts and changes and as the intervention introduces new challenges. This understanding emphasizes the value of an embedded experimentation mindset, in addition to focusing on a successful experiment. Enhancing our collective capacity to engage with diverse voices, and to understand, develop and test systems interventions, strengthens our ability to continuously develop solutions in response to the shifting challenges facing societies.

Let's go to work

> We noticed a widespread undervaluing and lack of support for people, organizations and ideas in the "getting there" period. Avoiding taking risks continues to be prioritized over testing ideas that may move, nudge or shove the needle on solving problems. Isn't the risk of maintaining the status quo actually greater in the long term than the risk of trying to do things differently, with great intentionality, today? —ABSI Connect Fellows[70]

There is a chorus of voices celebrating the growing interest and capacity in experimentation for systems change. Yet, the same voices worry it is just that: interest and capacity. It's time for increasing capacity to be put to work.

At MaRS, "the focus moving forward is on mobilizing capacity and leveraging resources for whole systems innovation," Ilse Treurnicht, CEO of MaRS, said. It sets the bar high for turning capacity into prototyping solutions and applying the now deep wells of learning around social innovation to grounded action. This is where many changemakers are at — not the dangerous edge of "prove it," but the urgency to get to impact.

> Don't overthink it. Pick a project that you are passionate about and start trying something different. Pick an area of uncertainty, where you don't have a template to apply and gather around some other people that are equally passionate. Be challenge based. Be comfortable with ambiguity and complexity. Be open to emergence and discovery processes. Be awake to new possibilities. —Alex Ryan

Winnipeg Boldness Project (Photo courtesy of the McConnell Foundation)

WellAhead (Photo courtesy of the McConnell Foundation)

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Whole systems change requires participation from the whole system

While the development of social innovation labs has been informed by and borrowed from design processes, they also honour and necessarily integrate whole systems practices developed by sociologists and community organizers over generations. Diversity of perspectives and participation of those most vulnerable in the systems you are trying to change, will ensure integrity of process and most useful, transformative outcomes.

Alex Ryan at SIX Wayfinder 2017 (Photo courtesy of SIX)

When at first you don't succeed, try, try again

Working in complexity often means failing multiple times before getting to an outcome worth scaling. Experimentation turns ideas into data and learning — what works and what doesn't. Every time you fail, integrate the learning into the next prototype. Context is always shifting in relation to variables outside of your control. Be awake to changing conditions and prototype accordingly.

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Don't wait, iterate!

With a growing field of capacity-building programs and resources in experimentation and lab practice, there is a compelling need to move from learning to doing. Find your fellow travellers and get started.

Mobilizing capital: Resourcing solutions

I realize that economic disruptions have marked huge shifts in my personal life. During the 1980s recession in the United Kingdom, we moved to Canada. In the 1990s, we moved from Saskatchewan to Hamilton. By the time the 2008 great recession hit, I was working for the Ontario Association of Food Banks and saw up close the shock for people who were now trying to work out how to feed themselves and their families. Food banks were flooded with people. We were trying to work out how to get people fed. We were growing food with farmers. Tax credits were devised to encourage fresh food donations. But it was never going to be enough. We had to figure out how to re-orient the economy and capital towards social and economic justice for a more resilient future.

—

Adam Spence, director of the Social Venture ConneXion (SVX)

In his 2010 article, "On Not Letting a Crisis go to Waste,"[71] Tim Brodhead, former president of the McConnell Foundation, explored some of the implications of the 2008 economic downturn for Canada's community sector and argued that new approaches were urgently required to ensure the community sector's health and to maintain Canadians' well-being. "It is important to bear in mind that the default is not to business-as-usual. Cyclical change can perhaps be handled by stop-gap measures and belt-tightening until things return to 'normal,'" Brodhead wrote. However, he continued, "structural change needs organizational resilience and a clear-eyed ability to distinguish between what must be held on to and what must be reinvented. And disruptive change is best dealt with ... by embracing innovation."[72]

In our efforts to foster an uptake of social innovation, SiG embraced finance innovation, exploring the new ways social purpose businesses and non-profits could be financed; we believed we could help provide an enabling infrastructure to bring that nascent activity — called social finance — to the surface.

Some of the SiG partners had been collaborating on the development of the social finance field as early as 2003, when community organizers and Plan Institute co-founders Al Etmanski and Vickie Cammack were researching a broad array of social innovation and complementary ecosystem approaches with the support of the McConnell Foundation. But when Etmanski and Cammack's concluding recommendation, to support the develop of social finance, was met with significant resistance in various constituencies, they realized they would have to step back and lay some groundwork. That work would later find a home in Causeway, a multi-stakeholder social finance field building initiative started in 2006.

THE RESEARCH WAS CORE TO THE SUSTAINING SOCIAL INNOVATION INITIATIVE DISCUSSED IN CHAPTER 1

In the early days of Causeway, talking with and engaging multiple constituencies was critical. One of its greatest hurdles was finding clear and inclusive language. "It was really difficult. A lot of people couldn't understand the message we were trying to convey," said Joanna Reynolds, former program manager at SiG National. "A number of influencers shrugged their shoulders and left the room. Or asked us to leave. The way we were talking about it may not have been right. The concepts make sense now, but at first [social finance] was a new thing. When I would speak about these issues with the community sector, I was surprised at how reticent people were. It raised a lot of red flags. They were cautious and rightly so," Reynolds recalled.

"Everybody had their reasons for saying no. Some of them were value-based and some were just a refusal to look at alternatives. That's when intrapreneurship became really important. If key intrapreneurs could see the nugget of possibility for change, they would be the key turners," she said.

INTRAPRENEURSHIP IS THE PROCESS OF INITIATING NEW VENTURES OR CREATING NEW SOURCES OF VALUE WITHIN AN ESTABLISHED ORGANIZATION.

When SiG National was formed, all the partners agreed that social finance — mobilizing private capital for public good — was a galvanizing challenge and a useful focus for joint pursuit. While the Causeway work continued, the SiG principals began discussing how they could contribute. At a 2008 meeting, they discussed the convening of a blue ribbon task force that could help catalyze policy and private capital investment and enable greater sustainability for the community sector.

When prospective members of the Canadian Task Force on Social Finance were approached in the summer of 2009, the world was still reeling from the collapse of global capital markets. With significant groundwork laid by Causeway up to this point, SiG recognized the financial crisis presented a window of opportunity through which government, business and the community sector might be willing to accept some divergent change.

The catalyst

While there is not enough money in foundation and government coffers to meet the defining tests of our time, there is

Everyone knew there was plenty of capital available for traditional investing. What Canada needed was mechanisms to encourage and redirect that capital. Among SiG's many inspirations for this work was the U.K.'s Social Investment Task Force, convened in 2000 and chaired by Sir Ronald Cohen — a prominent social finance pioneer.

While the British model was closer to a Royal Commission, with the authorization of the Chancellor of the Exchequer, the Canadian version was funded by volunteers and philanthropy, moving ahead of government, although inclusive of feedback from the late Jim Flaherty, then federal finance minister. As Tim Draimin, executive director of SiG National, recalled, "[Flaherty] had a pile of documents next to him from his staffers that were all negative commentary on the idea of the task force and indeed social finance. But he was very intrigued by it nonetheless and said if we went ahead on our own, he guaranteed he would receive the report."

Outreach and institutional engagement

SiG then turned our focus to research and engagement to develop recommendations for the task force to consider. The composition of the task force was carefully crafted, ensuring the recommendations would carry influence, gain traction at leadership levels and present a non-partisan message. MaRS CEO Ilse Treurnicht agreed to chair the task force, providing strong leadership and important in-roads into policy and business communities.

The full composition of the task force became:

Ilse Treurnicht, task force chair and CEO of MaRS Discovery District

Tim Brodhead, president and CEO of the McConnell Family Foundation

Sam Duboc, chairman of Pathways to Education Canada and founder of Edgestone Capital Partners

Stanley Hartt, chairman of Macquarie Capital Markets Canada

Tim Jackson, CEO of the Accelerator Centre and partner of Tech Capital

Rt. Hon. Paul Martin, former Prime Minister and Minister of Finance and founder of Cape Fund

Nancy Neamtan, president and executive director of the Chantier de l'économie sociale

Reeta Roy, president and CEO of the Mastercard Foundation

Tamara Vrooman, CEO of Vancity Credit Union

Bill Young, president of Social Capital Partners

The task force was served by a secretariat that included Allyson Hewitt, director of SiG@MaRS, and Tim Draimin and managed by strategist and coach, Robin Cory. All the while, Joanna Reynolds, with a growing team, was developing broader community development events. The Social Finance Forum, first held in 2007 at MaRS in Toronto and headlined by Sir Ronald Cohen, was a vital and legitimizing arena for discussion, while SocialFinance.ca, co-developed by Causeway founding partner, Michael Lewkowitz, and Karim Harji, co-founder and director at Purpose Capital, provided a much-needed virtual space for dialogue and knowledge sharing.

More than money

While redirecting financial capital was the goal, numerous systemic obstacles were preventing a healthy social finance ecosystem from growing. The task force recommended greater financial investment, while encouraging the creation of an enabling tax-and-regulatory environment and fostering further development of the social enterprise and social business communities.

← PARTICULARLY GREATER FLEXIBILITY FOR CHARITIES & NON-PROFITS TO EARN REVENUE IN SUPPORT OF THEIR MISSION

The release of the task force's seven recommendations and report, "Mobilizing Private Capital for Public Good," was attended by more than 400 people at MaRS in 2010, drawing endorsement from international social finance leaders, including Sir Ronald Cohen and Geoff Mulgan, then chief executive of the Young Foundation in the U.K., as well as Rockefeller's Judith Rodin, Katherine Fulton of Monitor Institute and Jed Emerson, originator of the blended value concept. The recommendations were subsequently received by the federal government and many provincial governments across Canada and were endorsed by several Canadian foundations and representative community sector networks, such as Philanthropic Foundations Canada and Community Foundations of Canada.

Reflecting back on the task force's usefulness, Bill Young, member and president of Social Capital Partners, said, "I think there needed to be a rallying document for people to read and understand and disagree with and to have something to put in the hands of the multiple stakeholders involved. And I think some of the recommendations have been rallying cries." But Young's confidence in task force processes has been challenged over subsequent years. "Unfortunately, in this country, we have a core competence creating task forces and we have no core competence in implementing their outcomes. So, I think a lot of the recommendations have been lost with each successive government," he said.

Social finance isn't a panacea. It will not respond to the needs of all organizations working towards some form of social benefit, nor does it suggest reducing existing financial flows into social impact. Charitable contributions, for example, remain necessary. Government funding is absolutely vital for our social safety net. Not all charitable and non-profit initiatives will have the potential for an earned income or impact investing business model.

There are other community financing models that inspire and continue to offer valuable insights to the social finance field, including the social economy in Québec and the cooperative and credit union movements nationally. As with innovation in general, experimenting with combinations of a diverse range of forms and approaches will result in a more resilient whole.

Like Young, Reynolds also found the task force a useful catalyzing vehicle, "I think the task force was important at that moment, but it was only a part of the story," she said. While the task force members set out seven recommendations to move money in new ways, they also unofficially recommended the establishment of a dedicated institution to further mature the marketplace and ensure attention remained on social finance. As a result, the MaRS Centre for Impact Investing (MCII) was born.

"We felt it was important to have the Centre for Impact Investing as a kind of an ongoing workhorse. We were very encouraged — all of us — by the energy and the engagement of people from across the country, and the concern was because it was so nascent a field, if we just put out the report and hoped for the best, without the ongoing jollying work of continuing to build the market, it wouldn't have the same traction," Ilse Treurnicht, chair of the Canadian Task Force on Social Finance, recalled.

Passing the baton: MaRS Centre for Impact Investing

Officially launched in 2011 to continue the "jollying work" of social finance, MCII would

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continue to push for the uptake of the recommendations, while also advising clients on the creation of funds in various issue areas and on financial instrument creation — community bonds, retrofitting assets and so on.

"We are starting to hit our stride, but it hasn't been easy," said Adam Jagelewski, director at MCII. Their first step was to focus on building a solid reputation. Just like the task force and Causeway before it, MCII has been working to get the principles of impact investing and social finance into the water supply. Catalytic mechanisms such as a task force get the ball rolling but the road to greater investment in social impact work is ongoing. Perhaps no story illustrates that fact better than the tension surrounding social impact bonds.

Vancity CEO, Tamara Vrooman at SIX Summer School 2014 (Photo by Komal Minhas)

Learning by doing: Social Impact Bonds (or pay-for-success models)

During the research of various financing tools for the development of the task force recommendations, one model came under considerable scrutiny — Social Impact Bonds, or SIBs. "We were part of the vanguard for helping people grasp hold of social innovation tools, mindset and methodologies," Tim Draimin recalled. "When advancing a new field like social finance, it is great to have examples like SIBs that contain within them some of the core ideas, such as reducing risk for government, leveraging new capital, being part of the shift from funding outputs to funding outcomes."

Yet, researching a model and actually implementing it with fidelity can test even seasoned innovators. "We did explain that while simple to communicate, SIBs were at the more complicated end of social finance because of the need for a sophisticated intermediary. In other words, there are other easier places to start," Draimin said. Due to the reduced government investment risk, however, SIBs were exactly where governments wanted to start. Jagelewski described it as "the hammer looking for a nail approach." He was contacted by almost every government for advice on the model and many ministerial mandate letters have called for consideration of the instrument across Canada.

"Clearly, we weren't sufficiently cognizant of communications and narrative as a pillar in any change strategy," Draimin noted. "We focused so much on policy: the core idea and trying to understand the characteristics of the idea and what it meant to be able to deploy it. We didn't realize that one of the major barriers was a lack of public acceptance, whichever public was the core for it."

With ongoing pushback from the social sector, too few intermediaries able to manage the instrument, and yet increasing interest "from governments", SIBs continue to be a niche model hotly debated globally. It is likely that a greater focus on public mobilization upfront, in addition to policy, would have helped build more positive momentum around SIBs.

MCII INTERMEDIATED THEIR FIRST NATIONAL SIB IN OCTOBER 2016. WWW.HEARTAND STROKE.CA/CHPI

Profile

Solutions finance at the McConnell Foundation
By John Cawley, vice president at the McConnell Foundation

Inspired by the work of the ongoing Canadian Task Force on Social Finance, in 2009 the foundation established a target of five per cent of the endowment that would be committed to impact investments. Due to a lack of investment-ready products in the market, we initially focused on a small number of mission-related investments (MRI) with a proven track record. We have since increased that target to 10 per cent of the endowment, have applied robust Environment, Social and Corporate Governance (ESG) principles to the entire endowment, and have actively sought out investment opportunities that amplify the impact of our program strategies. Examples include:

THE TASK FORCE CALLED FOR FOUNDATIONS TO INVEST AT LEAST 10% OF THEIR CAPITAL IN MRIS BY 2020.

* **Investing in renewable energy and the economy** — CoPower lends money to revenue-generating clean energy projects, while opening up the market to retail investors.

* **Investing in sustainable food systems** — Area One Farms brings committed investors and farmers together to invest in undervalued land, grows farms in a way that keeps the farmer in an owner position and provides the capital necessary to enable farmers to test out sustainable farming practices.

As of August 2017, there are 21 investments totalling $50 million.

Movement building

The foundation has been actively involved in learning about the relatively new phenomenon of impact investing with peers in the banking sector, pension funds, foundations and other institutional investors, as well as with the beneficiaries of the capital: the community sector and social enterprises. This research culminated in a widely distributed white paper and due diligence guide on impact investing created by foundation staff. We have also joined SHARE (Shareholder Association for Research and Education) to constructively engage companies on key ESG issues and, through voting rights, influence corporate behaviour. By supporting the development of the Centre for Impact Investing, the Social Venture ConneXion and the Canadian Impact Infrastructure Exchange (CIIX), we are strengthening the development of the impact investing market.

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From impact investing to solutions finance

In the context of our work, we're advocating for — and adopting as practice — an integrated approach to deploying financial capital and adapting financial models to catalyze, sustain and scale systems transformation; in other words, solutions finance.

The foundation has the flexibility to provide grants, first loss investments, or other forms of riskier capital to leverage additional financial resources from the public and private sector. Examples include: creating a $15-million loan guarantee mechanism with two other foundations that will enable financial institutions to offer more affordable loans to social enterprises; demonstrating the value of innovative financial mechanisms for Indigenous social entrepreneurs; and affordable housing initiatives to eventually unlock larger pools of government funding.

This has also led McConnell to engage with governments to identify changes to the financial rules of the game that could facilitate uptake of the Canada Learning Bond, increase northern food security, energy security and employment opportunities, and revitalize neighbourhoods through the repurposing of underutilized civic assets.

A FEDERAL GOVERNMENT CONTRIBUTION TO LOW-INCOME CHILDREN'S REGISTERED EDUCATION SAVINGS PLAN

Generative partnership

Each of the SiG principals remembers the task force as the galvanizing opportunity to pool creativity and capacity around a goal. Tim Brodhead, Al Etmanski and Tim Draimin were critical in the early work with Causeway; Allyson Hewitt brokered relationships at the provincial level and managed program development at MaRS; Ilse Treurnicht chaired the task force; Frances Westley, J.W. McConnell chair in social innovation at University of Waterloo, along with University of Waterloo research fellows, contributed enormously useful research; and the McConnell Foundation provided capital, networks and validation. "The work is never done but the task force was pivotal," Hewitt said. "There was a movement happening, particularly in the U.K., and Canada was not on the agenda. It got us on the map."

Momentum is working in favour of impact investing. There is a new generation of investors asking for more ways to invest money with impact. Foundations are shifting significant capital away from traditional endowments and towards mission related investing. An Ontario-based generative partnership of seven foundations and a bank has just been struck to better share information and invest with greater fidelity. While tepid, mainstream finance is sensing interest in social finance from clients and innovators are introducing new models and products into the market every year. Platforms such as the Social Venture ConneXion (SVX), launched in 2013 to provide a single access point for raising impact capital and making impact investments, are scaling in Canada and abroad.

"We have a $9.2-billion impact investment market annually now. Before 2010, it was a little over $4-billion. It's growing $15-billion year over year globally. It's changed a lot since the task force. It wouldn't have happened without that initiative," Adam Spence, director of the SVX, said. "There is still a long way to go and It will take a generation for all investments to be impact investments. But it will happen."

Social Venture ConneXion launch 2013 (Photo courtesy of MaRS)

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Founding MaRS CEO Ilse Treurnicht (Photo courtesy of the World Economic Forum / Sikarin Thanachaiary)

It's never too early to engage the whole system

SiG and Causeway partners learned quickly that reaching out to more and different stakeholders early is essential to legitimizing a field of activity and informing the movement while growing it. Be open to inevitable critique. Recognize that you have a lens on a field, not *the* lens.

Ingrid Burkett and Carolyn Curtis of TACSI listening to Amplifier Montréal ethnographers (Photo by Geraldine Cahill)

Nothing is obvious to everybody

Set up channels for frequent dialogue and communication; listen for and adapt messaging based on feedback from the system. Many of the concepts in an emerging field of activity will not be self-evident to many stakeholders.

Build on assets, iterate for impact

Social finance may sound like a new concept, but it is a contemporary extension of a field rich in history and experience. Lessons from the cooperative movement and the social economy in Québec are just two examples of existing community-based assets we can build on in the creation of a more robust finance ecosystem for impact.

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Philanthropy and social innovation

By Tim Brodhead, former president of the McConnell Foundation

Photo courtesy of EWB

Social Innovation Generation (SiG) was a philanthropic innovation. Frustrated by the inability of many initiatives it was funding to move from proof-of-concept to large-scale impact, the McConnell Foundation looked at how it could support an ongoing process of innovation and then — with the launch of SiG — how it could create in Canada a culture of continuous social innovation.

SiG's purpose was to explore systems change rather than individual innovation. Its uniqueness lay in its cross-sector composition — engaging and learning from the private sector, government, academic and community-level understandings of innovation. It also lay in its ambition to create an ecosystem of support for social innovation that included new financial models, mindsets, policies and institutional arrangements.

SiG itself was an experiment. Could four very different kinds of institutions collaborate effectively? Was its goal too abstract and ambitious? Could it be sustained long enough to see tangible results? Could its principals accommodate the disruptive effects of change it was prescribing for others in the social sector?

Change can be exhilarating, and at the same time scary. We often equate it with progress, proclaiming everyone a changemaker without always asking "change by whom, to what end, and for whose benefit?" Until recently, North Americans in particular have viewed change as a linear march towards greater opportunity and prosperity. Our dominant economic paradigm champions constant innovation driven by science and technology and propelled by market forces. According to this view, successful innovations are those that increase productivity or market share, or create new products and processes. We willingly accept the concept put forth by American economist Joseph Schumpeter in the 1930s of creative destruction in the economy: Businesses innovate or they die. Economists reassure us that short-term pain for some is more than justified by the long-term benefits of new ideas and more efficient use of capital.

We face two paradoxes. One, large-scale changes are needed urgently to improve the living conditions and well-being of much of humanity, yet balancing opportunity and risk is best done by those who are most affected by change but often lack the power and influence to shape it. Two, while Canadians celebrate and promote private sector innovation, they are suspicious of significant change in the public sector. The education system at all levels is famously resistant and efforts to fix Canada's health care system have been called the "third rail" of Canadian politics.

The accelerating speed and scale of change is marked by a new term — disruptive innovation — to denote the upending of whole sectors

including manufacturing, transport, hospitality, and the financial, legal and other professions. A quote from William Gibson: "The future is already here; it is just not evenly distributed" captures the unequal impact that technology-driven change has on people's lives.[74] The effects of change are never neutral, its costs and benefits are distributed according to a society's values and structures. Older, less educated, and more vulnerable people bear more risk and may see few or none of the benefits.

SiG's conception of social innovation attempts to address these paradoxes. It recognizes that many of our public institutions and systems are rigid, ineffective and often "worsen problems they were intended to solve"[75] and that innovations that meet people's needs most often originate at the margins, among the most vulnerable, and from individuals and groups that community organizer Al Etmanski calls "passionate amateurs." For SiG, social innovation must have an ethical dimension, one of socializing the risks and costs of disruptive change and protecting the most vulnerable.

It recognizes too that many of our most intractable problems — poverty, reconciliation with Canada's Indigenous Peoples, protection of the natural world — require shifts in our understanding, our relationships and "the basic routines, resource and authority flows" of society.[76] Put simply, we need to change how power is distributed and used.

In a democratic society issues of power and equity are determined collectively through the political system. Only government has the capacity and legitimacy to address the negative effects of societal change and to buffer its impact on those least able to adapt. Where government lacks the ability or will to act, the default is to private interests: Change is propelled by market forces, or by philanthropy, and the burden of adjustment is borne by individuals. Society is divided between (a few) winners and (many) losers.

This brings us to a third paradox: Philanthropy is trying to solve problems of which it is a symptom. Many commentators have pointed to growing inequality as a major cause of the division, alienation and anger in Western societies. The uneven flow of benefits from technological change and globalization has created massive fortunes even as mid-level incomes have stagnated. U.S. foundations, in particular, are both a product of this skewed wealth and a major contributor to it through the influence some now wield on public attitudes and political actors.[77] Can acts of personal generosity by the super-wealthy obviate the need to question the structural causes and social harms caused by growing inequality?

It is not a coincidence that the championing of social and community-led innovation arose when confidence in government had eroded[78] and trust in business was shaken by the 2008 financial crisis. However, we are on the threshold of what has been called the Fourth Industrial Revolution. As Klaus Schwab of the World Economic Forum warned: "The response to it must be integrated and comprehensive, involving all stakeholders of the global polity, from the public and private sectors to academia and civil society."[79] Philanthropy has an important role to play, not least by encouraging and supporting social innovations, but it cannot substitute for private sector inaction or governmental paralysis.

"When you disrupt something, it doesn't mean they are ready for you," Al Etmanski remarked at the 2014 SIX Summer School in Vancouver.[80] This is a critical consideration for all self-identified change-makers, especially the philanthropic community, which must now examine where it fits in the complex relationships, histories and power that underlie so many of our greatest challenges.

The charitable and community sectors are already feeling the effects of change: Younger generations have different motivations for giving, while new technology platforms and business models are unleashing the same forces that disrupted the private sector. Foundations are somewhat insulated by their wealth and autonomy; they navigate the contested area of change as a private power that seeks public good, uneasily balancing personal choice and public responsibility. But they too are being challenged to adapt their practices to reflect a new world and to apply their own prescription: take risks, be transparent and accountable, and move from paternalism to shared responsibility.

Social innovation is a journey, not a destination. It is an expression of faith in the power of human imagination to respond creatively to disruptive change. But there is only so much individuals can do on their own; a supportive ecosystem and a culture open to risk and opportunity and committed to sharing the benefits is our ultimate goal.

Transforming business models: Generating shared value

Business can exist to consider other stakeholders in decision-making. Broadening your responsibility to think beyond the bottom line. The idea that we are interdependent. We don't operate in a silo. We have impacts beyond just what we have on our balance sheet.

—

Joyce Sou, director of B Lab Canada

In the spring of 2007, Allyson Hewitt visited MaRS Discovery District in Toronto for the first time. "I remember thinking two things: what is this place and how can I make it available to the non-profit sector?" Hewitt said. At the time, a *Stanford Social Innovation Review* article, "Social Entrepreneurship: The Case for Definition" by Roger Martin, who was then dean of Rotman School of Management at the University of Toronto, and Sally Osberg, president and CEO of the Skoll Foundation, was fuelling conversations about the role of profit and entrepreneurship in social change.[81] Six months later, Hewitt became the director of SiG@MaRS, jumping into organizing a Social Entrepreneurship Summit and directing traffic at the intersection of innovation, profit and impact.

It was the same intersection Martin and Osberg had tried to navigate in their article, setting a definition around the popular concept of "social entrepreneurship" to give it more power, currency and direction. They distinguished an entrepreneur — someone leveraging opportunity to accrue benefit to self and investors — from a social entrepreneur — someone who leverages opportunity to accrue transformation-al benefit to a segment of society or society at large. "This does not mean that social entrepreneurs as a hard-and-fast rule shun profit-making value propositions," they qualified. "Ventures created by social entrepreneurs can certainly generate income and they can be organized as either not-for-profits or for-profits. What distinguishes social entrepreneurship is the primacy of social benefit, what Duke University profes-sor Greg Dees in his seminal work on the field characterizes as the pursuit of 'mis-sion-related impact.'"[82]

MaRS, one of the world's largest urban innovation hubs, had an early stake in embracing that primacy of social benefit, as it incubated and accelerated disruptive businesses and technologies. "Our motivation for bringing the social side in was to make sure that the societal understanding of the impacts are developed at the same time," Ilse Treurnicht, CEO of MaRS, explained. "And trying to bring [together], not just the technology community, but the incumbent business community, the policy-makers and all of the players to the table and be a learning platform for everybody on this emergence [around social impact]."

With the introduction of SiG@MaRS in 2007, MaRS went through a process of discovery. "We had the opportunity with the SiG partnership to come up the learning curve pretty quickly, it gave us the chance to hire someone like Allyson [Hewitt] who had real competency," Treurnicht said.

Hewitt began her role by developing social innovation as an adjacent pillar to MaRS' other innovation areas, looking for inroads to help the technology hub and its clients grasp how this social impact theme fit with their work. However, she quickly learned that integrating social innovation into the core of MaRS's services was both essential — to mainstream supports for social entrepreneurs — and apropos, as many entrepreneurs already using the services realized they were, in fact, social entrepre-neurs. "I had people come up and literally slap themselves on the forehead like a V8 [juice] commercial and say, 'oh my god, I'm a social entrepreneur. I didn't know there were other people like me out there! There's a whole world of social entrepreneur-ship?'" Hewitt recalled. "It was amazing. So, we met them where they're at, pushed their comfort level, gave them new language and then did the same with social finance. People get finance. We had social in front of it. They get investing; we add impact in front of it … So that's what we did."

As Hewitt embedded social innovation into MaRS's suite of entrepreneur sup-ports, new demands led to a rethink. "After seeing a flood of demand, it forced us to go back to two questions: Where are we uniquely positioned through our networks, capabilities, connections to technology solutions, understanding of business models and enterprise development? Where can we make the biggest difference?" Treurnicht recalled. The answer was: working with social ventures that are scaling. Helping

ventures mainstream was already its niche for STEM businesses and MaRS realized it could extend that infrastructure to social ventures. That meant extending both their supply-side strategies, supporting ventures, and demand-side strategies, getting "major actors in the innovation system — from the financial institutions to the best entrepreneurs to the top talent to the people who think about business models and customers — to actually embrace that these kind of [social] businesses are (a) viable and (b) important and this is what they want to make their life's work," Treurnicht said.

MaRS, an independent charitable non-profit, found itself "standing at the intersection of multiple sectors, bringing them together for the greater good," Joeri van den Steenhoven, former director of the MaRS Solutions Lab, said. With the SiG@MaRS work embedded deeply at the heart of MaRS's operations, Hewitt turned her focus to the incubation and development of signature systems transformation work, including MaRS Solutions Lab, the Studio [Y] Fellowship for emerging systems leaders and MaRS Centre for Impact Investing — just some of MaRS's offerings focused on system change, including those in health care, energy, leadership, finance and more.

A RESIDENCY-BASED PROGRAM TEACHING THE FOUNDATIONS OF SYSTEMS LEADERSHIP

Reframing business as usual

MaRS was not alone in shifting its attention to the importance of engaging all three sectors in transformational change. Collectively, the SiG partners recognized that non-profits and governments were situated in increasingly austere and restrictive environments. The responsibility to support communities could not be solely the prerogative of government and civil society. In addition to new revenue streams for non-profits to have impact at scale, business offered a significant vehicle for sustained community benefit through social purpose business models. That left SiG asking: What new models are being developed to embed social impact in markets? This is often referred to as blended value in that market activity creates a blend of social, environmental and financial value.

At SiG, we saw this blending as a spectrum. On the left of the spectrum, social and environmental value are most important, with financial value a distant third. This is the model of traditional non-profits and charities. On the right, financial value trumps social and environmental value, the traditional model of business, especially public corporations with their focus on maximizing shareholder value.

IF IT'S CONSIDERED AT ALL.

BUT CANADIAN PRECEDENT CHANGED IN 2008 SO CORPORATIONS MUST CONSIDER SHAREHOLDER & STAKEHOLDER INTERESTS

With this spectrum in mind, the SiG partners were interested in two goals. One, to support the field of business models in the middle — social enterprises — as entrepreneurs challenged and worked around restrictions in Canadian legislation and tax code to generate revenue for impact. To advance a growing understanding that business approaches aren't just good for sustaining social and environmental impact, but also that social and environmental impact is fundamentally good for business.

Social enterprise Inc.

In 2010, SiG@MaRS was focused on research, building a narrative and advocating for change in Ontario regulation. Working with community partners, the Centre for Social Innovation and the Ontario Non-profit Network, SiG@MaRS identified 300 organizations running social enterprises in Ontario, with a solid base of them in operation for more than 25 years.[83] Since then, the market has grown by leaps and bounds, according to Adam Spence, director of the Social Venture ConneXion (SVX) at MaRS. "The number of enterprises that have been identified — that actually already existed — has grown as people recognize their status. And then the growth of people doing this coming out of schools is significant as well. From 300 social enterprises identified in 2010, there is now 10,000. It's remarkable," he said.

Significantly, the growth in social enterprises was linked in part to people recognizing they are running social enterprises. What counts as a social enterprise in Canada is not uniform. Governments and communities often delineate by corporate form, limiting the social enterprise title to non-profit social ventures, while others include for-profit social ventures in their definition.

Distinguishing corporate form

	For-profit	Non-profit	Charities
Business activities	Flexible	Limited exclusively to non-profit purposes	Limited to "related businesses," subordinate to the charity's purpose
Capital raising	Equity, debt	Grant, donation, community bond, debt	Grant, tax-receipted donation
Profits	Distributed to investors and lenders (accumulation permitted from year to year)	Limited to promoting its stated goals (limited accumulation permitted from year to year)	None, reinvestment aligned to charitable articles
Accountability	Accountable to shareholders and stakeholders	Legally enforceable non-profit purpose	Legally enforceable social purpose

This chart is a high-level summary distinguishing how different corporate forms are allowed to generate revenue, manage profits and pursue social or environmental impact. However, the legal environment in Canada is not uniform; specific regulations differ by jurisdiction.[84]

MAKING IT HARD TO FIGURE OUT HOW TO IN CORPORATE WHEN YOUR GOAL IS BLENDED VALUE!

Similar to the argument put forth by Martin and Osberg, the debate on corporate form relates to "primacy of social benefit." What is the right balance of revenue and impact? Financial sustainability is critical to scale, yet the depth of impact may be undermined by shareholder pressure. In 2010, MaRS and Canadian law firm Ogilvy Renault, supported by the Province of Ontario, explored alternative business models that would keep social mission paramount and allow enterprises to generate revenue without penalty. After examining the global landscape, the authors focused on a recommendation similar in form to a "community interest company" in Britain.[85]

7

Excerpt: A recommendation for Ontario

Ontario could pass a statute that would be more likely to assist in creating brand awareness, profile and legitimacy for a new community benefit vehicle. The legislation would provide for the establishment of community enterprise corporations (CECs)...

To distinguish CECs from other vehicles, it is necessary for the enterprise to be allowed to make a profit and return it to its security holders. However, it should be a low return given its community benefit nature. For this reason, its authors felt that a capped-return mechanism for shareholders and debt holders, similar to that used by CICs would be appropriate.[86]

The recommendation was far-reaching and supported similar efforts in different jurisdictions. The B.C. Social Innovation Council made similar recommendations to enshrine Community Contribution Companies (C3) as an amendment to the Business Corporations Act of 2012 and the Government of Nova Scotia instituted the Community Interest Companies Act of 2016.

While the Government of Ontario had yet to decide on a hybrid business model at the time of this book, the advocacy of many social enterprises and their networks, along with MaRS and SiG@MaRS, influenced the work of the Ontario Ministry of Economic Development and Innovation (MEDI), which created the Social Enterprise Branch. Hewitt pointed to the importance of "getting government to recognize the potential for social enterprise as an economic driver. We built advisory services around it … and helped get people to recognize that social enterprise was great. At the same time, there was a growing trend to embrace this space by both non-profits and for-profits. Prospective social entrepreneurs were often sector agnostic and in fact keen to embrace the concept of social purpose business. This was accelerated when we brought B Corp to Canada."

From social enterprise to social transformation

B Corp is a movement of certified companies "using the power of business to solve social and environmental problems," housed at the U.S.-based B Lab.[87] In 2011, following an inquiry from a group of young business school graduates interested in launching a for-profit social purpose platform, Hewitt and the MaRS Centre for Impact Investing explored the B Corp model and decided to bring it to Canada.

Grameen Danone, a joint venture between Danone, the international health and nutrition company, and Grameen Bank, a micro-finance and community development organization based in Bangladesh.

"Business impacts our daily lives in so many ways and many aspects of it need to change because we have significant social and environmental challenges that aren't helped by our business community. There is a direction that business can take to directly address those challenges," said Joyce Sou, who joined the MaRS Centre for Impact Investing in 2011 to develop the B Corp community and became the director of B Lab Canada in 2015.

For-profit companies certified by the non-profit B Lab must meet rigorous standards of social and environmental performance, accountability, and transparency. As of summer 2017, there was a growing community of more than 2,200 Certified B Corps across 50 countries and more than 130 industries, with more than 200 of those in Canada — up from only 12 when Sou first started at MaRS.

Major hurdles for the B Corp movement remain. New companies, for example, may have a great idea for how to meet the B Corp standard but they aren't well-equipped to document their development. Meanwhile, for larger, more established companies, cultures and mindsets are more entrenched, often resisting or misunderstanding the integration of social and environmental well-being into the heart of the business model.

Perhaps the hardest nut to crack, and to some degree a game-changer, will be engagement with multinational corporations. Danone, a multinational food-products corporation based in Paris, France, is the first of its size to express interest in B Corp certification. Danone's public announcement caught the attention of Walmart, which congratulated its commitment to using business to create positive impact.

Danone isn't alone. There is a growing wave of company leaders who argue that social, environmental and financial value are not only compatible, but synergistic. During his final year as CEO and president of Royal Bank of Canada, Gord Nixon said, "[At RBC], we believe that addressing core social and environmental issues and providing a financial return are not mutually exclusive. On the contrary, they are becoming more closely linked than ever before. And they are both critical to building long-term success."[88]

Nixon's focus on long-term success echoes years of research and advocacy by Dominic Barton, CEO of McKinsey & Company. In a 2011 *Harvard Business Review* article, "Capitalism for the Long Term," Barton noted, "In truth there was never any inherent tension between creating value and serving the interests of employees, suppliers, customers, creditors, communities, and the environment."[89] To prove the point, he referenced surveys of nearly 2,000 executives and investors from 2008 and 2010, where "more than 75 per cent [of respondents] said that environmental, social, and governance (ESG) initiatives create corporate value in the long term. Companies that bring a real stakeholder perspective into corporate strategy can generate tangible value even sooner."[90]

At SiG, we delved into the symbiosis between corporate, social and environmental value creation under the guise of "Corporate Social Innovation" (CSI) with the 2013 Breakthrough Capitalism event — a cross-sector gathering partnering the U.K. B Corp Volans with MaRS, Royal Bank of Canada, KPMG, the McConnell Foundation, Canadian Business for Social Responsibility (CBSR) and many others. The event focused on the movement started by John Elkington, chairman and chief pollinator of Volans, to break through the status quo and turn corporate capacity into a central force for system-level change — "a reboot of capitalism through radically re-envisioning their business models."[91]

Partnering with MaRS and KPMG, SiG followed up on Elkington's call to action with a 2014 report, "Breaking Through: How Corporate Social Innovation Creates Business Opportunity," showcasing CSI powerhouses and guidelines for how to take up CSI for business, social and environmental prosperity.[92]

THEY CATALYZE MARKET CHANGE THROUGH AGENDA-SETTING, ADVOCACY & ADVICE

The CSI ecosystem, though young and slow moving, represents a powerful and necessary bridge to change. "I think the more we can build case studies and proof points of the blended value proposition... that's where you start to see the opportunity that people can buy into ... we can build true models where the impacts are aligned and can co-exist and mutually strengthen each other," Treurnicht said.

When asked if there is cause for optimism in the corporate social innovation community globally, Charmian Love, co-founder and co-chair of B Lab UK, echoed Stephen Huddart's opening preface to this book. "The Sustainable Development Goals (SDGs) create a helpful roadmap for corporations to focus their innovation budgets and resources on outcome areas that can provide strategic returns to the business as well," she said.

"I'm hopeful that deeper, wider, longer-term engagement from corporations is closer on the horizon. There are many leading examples to draw on, such as Unilever's Foundry. However, it would be wrong to underestimate the potent antibodies to change — the resistance that we might see from some big businesses when faced with the existential question 'how do you plan to reinvent your business model so it is fit for the 21st Century?" Love concluded.

After the release of "Breaking Through" in 2014, the SiG partners found themselves at a crossroads, wondering where they were best positioned for the biggest impact in this space. MaRS was championing social finance, enterprise, and investing, transforming the discussion amongst its clients, tenants and partners, but the other SiG partners had less connectivity with or focus on the private sector. Although the "Breaking Through" report was well received, SiG decided to step back from direct engagement with corporations and support MaRS, which was far ahead and way down the field.

AN INNOVATION PLATFORM TO TRANSFORM UNILEVER'S GROWTH MODEL TO MAKE SUSTAINABLE LIVING COMMONPLACE.

Windsor Rooftop (Photo courtesy of CoPower)

But is this getting to systems change?

The interplay of impact and profit is a tricky balance. On one side of the scales are traditional capitalists who view social and environmental impacts as external to business value; on the other side are communities suspicious of corporate intent, developed over time and through experience. Social enterprises especially, with all the nuance around what qualifies as a social enterprise and what they are intended to do, get tossed around in the middle of any debate on blended value: valorized, critiqued, celebrated or usurped.

Sean Geobey, director of academic programs for the Waterloo Institute for Social Innovation and Resilience, cautioned against putting too much focus on social enterprise as a means to changing systems. "I think there is a real danger with the social enterprise space. While there are definite merits, they are often overstated. The logic is about making the existing power and economic structure 'nicer', rather than in changing the power and economic structures. The thing that a social enterprise legal form opens up is investment. But if those opportunities actually succeed in attracting investment then those investors are going to ask for greater control and that can put the mission at risk," he explained. Geobey highlighted the potential fragility of the social enterprise model — how much depends on benevolent investors?

It is this dynamic of capital and power that SiG sought to transform with the social finance field by developing new capital flows for social enterprises; creating new opportunities for people to invest successfully with their values; unlocking underutilized community assets and changing the assumptions and rules of the investment game. "We were feeling our way forward and going where there was energy," Tim Draimin, executive director of SiG National, said. There is still much work to be done, and great urgency to do it, with a global trend of rising inequality. Thankfully, the sunset of the SiG partnership is not a sign that the challenge is too great; rather it is a sign there is a rich field of innovators, enablers, supporters and risk-takers, in both business and finance, committed to a marketplace that serves people and planet.

THE TIDE IS TURNING: MILLENIAL INVESTORS & ENTREPRENEURS OFTEN THINK OF IMPACT AS A NEED TO HAVE, NOT A NICE TO HAVE.

Evergreen CEO Geoff Cape speaks at MaRS for the SiG Inspiring Action for Social Impact Series 2015 (Photo by Geraldine Cahill)

7

Define then weave

While a definition provides an identity and a feeling of momentum in an emerging field, be mindful not to create another silo. Radical combinations are not just necessary for experimentation; embedding a social entrepreneurship mindset and weaving new learning into established business practice will reach more and different people.

Don't bury the lead

Leading edge companies like Unilever and Danone are stepping out to show that large corporations can make money and respect people and planet at the same time. Business has a culture and a mindset that requires radical change. We need to amplify the champions in this field until their leadership is common practice.

System resilience versus systems change

Systems have a powerful status quo and ability to snap back; the saying 'business-as-usual' is a well-deserved meme. While innovating models to sustain impact organizations is necessary in the short term, the long-term goal is shifting culture. Embedding blended value into the heart of market logic will support the transition towards a more resilient and sustainable future.

Allyson Hewitt at SIX Wayfinder 2017 (Photo courtesy of SIX)

Venus and MaRS dance

By Allyson Hewitt, director of SiG@MaRS

In 2007, Ilse Treurnicht, CEO of MaRS, and Dr. John Evans, president of the board and co-founder at MaRS, were approached by Tim Brodhead, then president of the McConnell Foundation, to participate in hosting Social Innovation Generation, a new collaborative to support and scale the foundation's highest impact grantees, a group of leaders that would subsequently be known as social entrepreneurs. Toronto-based MaRS joined the foundation, the University of Waterloo, and Plan Institute in helping create a culture of continuous social innovation in Canada.

MaRS, founded seven years earlier, though only opening its door in 2005, had a mandate to support the commercialization of research coming out of the surrounding academic health science centres. Today, there is a plethora of incubators and accelerators in Canada but in 2000 this was innovative thinking. While many were content to aim at this level, others had a grander vision: to help Canada succeed as an innovation nation. They saw an opportunity to reinvent innovation beyond technology and commercialization to include social innovation, believing they are the opposite sides of the same coin. Even a strict interpretation of this vision recognizes that commercialization could be a means of producing better health outcomes for Canadians.

The integration of social innovation into this primarily technology-focused innovation hub was not without its challenges. People at MaRS spoke a different language — terms such as angels, ventures, disruptive innovation and receptor capacity were commonplace — and it took a long time for those of us who grew up on the "Venus" of social innovation to understand and be understood by those who grew up in the world of business and science innovation.

We even saw symbols differently. When you walked into MaRS in 2007, you saw three banners hanging from the rafters with the phrase "convergence innovation" running across them. Some didn't understand what this meant; others thought it was simply about bringing together diverse players in the traditional innovation system, such as intellectual property lawyers, venture capitalists and scientists; still others saw a wider opportunity to bring wildly divergent thinking into convergent action to tackle complex challenges. A bold vision worthy of this landmark building.

Several staff did not understand why MaRS would embrace social innovation. How could they? This was not how they were trained. They were told that a strong economy, fed by intensive support for high-potential, high-growth startups, was the secret to economic prosperity. They were doing everything they could to get those startups access to mentors, networks, capital and customers. They had seen what BlackBerry had done for Waterloo, Ontario and they knew Canada needed more of those ventures to create a competitive and prosperous nation.

But those of us in the social innovation field

were eager to tackle disrupting the status quo. We were armed with the knowledge that change starts at relationships and we worked with the staff at MaRS to understand what motivates them. By giving staff the chance to live and work their values, we began to see the integration of social innovation into the core that is MaRS. Staff saw new market opportunities for their ventures and beyond that, they began to think at the systems level, intentionally focusing and strategizing on how one action by one player in one sector could have a profound impact in another, especially in the highly regulated areas of finance, energy, health and education.

Integration was also experienced through Entrepreneurship 101 (E101), a flagship education program attended by hundreds of prospective entrepreneurs every Wednesday night. They participated in workshops and heard from experts on topics such as how to write a business plan, how to price your product and understanding customers.

SiG@MaRS developed a separate program called Social Entrepreneurship 101, but before it got off the ground there was a decision to expose E101 attendees to the potential to have economic and social impact. The outcome: more women and new immigrants were attracted to E101 and to the opportunity to develop ventures that went beyond making money.

Meanwhile, SiG was having its own challenges. It was not until 2009, when the partners had the chance to work together on social finance, that the partnership would see the sum of the parts producing something that was greater than each could achieve on its own.

The first Social Finance Forum was held in October 2007 with a small group of early adopters meeting at MaRS to hear an address from Sir Ronald Cohen — known as the father of venture capital in Britain — via video-conference. He was a player who had the legitimacy of the establishment but who had embraced social finance, or impact investing. Taking the lead from Britain, which had held a Task Force on Social Investment in 2000, the Canadian Task Force on Social Finance issued its report in December 2010. The members were pulled from across sectors and the country and were chaired by Ilse Treurnicht, signaling the importance of this work to MaRS.

A few things came out of this task force. One

recommendation that didn't make it to the final report — the need for a focal point to continue the work — led to the creation of the MaRS Centre for Impact Investing.

Looking around the world to see what else was happening that could benefit Canada and grow its social innovation ecosystem, we found the U.K.-based School for Social Entrepreneurs. With the support of the Ontario Trillium Foundation, funding was received to conduct a consultation to determine the interest in bringing this program to Canada. Although it was not unanimous, we were able to secure support to get the initiative and the School for Social Entrepreneurs Ontario up and running.

We also saw an emergence of labs, led by MindLab in Denmark, as a new way to tackle complex challenges. After further exploring and then selling the concept to others, we eventually opened MaRS Solutions Lab.

It also became clear we needed to cultivate talent able to think at the systems level to lead in the innovation economy. We worked with the Province of Ontario to set up and pilot an educational experience that would reflect 21st century learning styles; cross-sectoral collaboration; and systems leadership. The result was Studio [Y].

Have we succeeded in integrating social innovation into the mainstream innovation agenda at MaRS? Not completely, but MaRS has been fundamentally changed by the experience. Its strategic directions now highlight the demand side, or systems pillars, as well as the supply side (which includes support for high-impact ventures). We recognize there needs to be a way to address the barriers to adoption of innovation and that we have to be cognizant of the impact of new technologies, such as Artificial Intelligence and the sharing economy, while keeping our humanity at the forefront. MaRS is supporting high-impact ventures that raise capital, create jobs and help grow the economy, and also help Canada make a positive social and/or environmental impact at home and around the world.

It is an innovation centre like no other. Building on the DNA of its founders and the vision of its staff, MaRS has helped position Canada — despite our small population and massive land mass — as a place to watch as we move headlong into embracing integrated innovation.

Enabling policy: Speak to where they are listening

Creating an enabling policy environment touches on the question, how do cultures change? The culture of the public service and mindsets and bureaucratic processes, the layers of approval processes, and the overall ethos of risk-aversion, those are not easily shifted. I appreciate we've come at these things multiple times but I do think that they're accretive — that each time we do it, we soften the boulder, open up the crack a little further.

—

Stephen Huddart, president and CEO of the McConnell Foundation

In December 2012, Social Innovation Europe, a major effort supported by the European Commission to build the social innovation field in Europe, released a report on systemic innovation, noting that "[complex] challenges confound the traditional response of defining a problem and then administering to resolve it. This is because they cut across different policy domains, sectors and political and administrative jurisdictions. Coherent responses to these kinds of challenges cannot be driven by single institutions but will be reliant on numerous people, organizations, institutions and stakeholders working in a coordinated way."[93]

In Canada, universal health care, public education and a national parks system were all coherent responses to complex challenges, reliant on national policy intervention, passionate leadership and inter-provincial collaboration to bring them to fruition. They are clear examples of social innovations becoming part of a system through policy change.

During our decade of partnership, SiG tried to create the conditions for enabling policy for social innovation. Initially, SiG's policy work was guided by former SiG senior fellow and strategic advocacy advisor, Sean Moore, who wrestled with the question, "How can we have one of the most successful societies this planet has ever known and yet have such a dissatisfying relationship with our government and political institutions?"[94]

In pursuit of the answer, Moore introduced a policy approach called strategic inquiry, which dramatically influenced the SiG partners. Community organizer Al Etmanski explained Moore's approach in his 2015 book, *Impact: Six patterns to spread your social innovation*, as "the process of discovering the priorities, language and tools of the group you're trying to convince — in this case government. Every person you're trying to influence has a blizzard of material, demands and crises coming at them ... If you want government to have empathy for your issue, you must have empathy for their challenges."[95]

For 10 years, SiG has quietly — and sometimes not-so-quietly — engaged in strategic inquiry through our hosting of dozens of events that invite politicians and civil servants at all levels of government to share their stories and their struggles to effect change within their jurisdictions. In hearing from those best positioned to shape and direct policy change, SiG made in-roads into creating an enabling environment for the social innovation ecosystem.

There were signals early on that social finance and social enterprise made sense to governments. Governments understand finance and looking for alternate sources of revenue and creating structures that could support the social sector was work to which government could relate. To engage government, we had to start where they were at — finance and enterprise — and build toward engaging them in social innovation.

"The Canadian Task Force on Social Finance was so clearly a policy-focused initiative," Tim Draimin, executive director of SiG National, said. The task force followed several years of building momentum; first in the form of Causeway, whose purpose was to develop strategies, potential products and policy recommendations, and later in the form of greater community awareness and support through convenings such as the Social Finance Forum, inaugurally sponsored by SiG@MaRS, Social Capital Partners, the McConnell Foundation and Tides Canada Foundation.

Concurrently, SiG met with leadership teams in the federal and provincial governments, listening for receptivity and comprehension of the social finance agenda, assisted by relationships developed over decades of community organizing and non-profit leadership work.

"Solutions-based advocacy focuses on relationships. People are more likely to say yes to someone they know and trust. There are allies attached to every system,

8

at every level, who are waiting for a good idea and the right person to come along," Etmanski wrote in *Impact*.[96] The SiG principals scoured their networks for these allies, then invited them to participate in the development of the agenda.

Ontario

Nothing happens in a vacuum. While the following work describes what happened from a SiG perspective, our work paralleled the work of partners — the Ontario Poverty Reduction Roundtable, Ontario's Non-profit Network, the Centre for Social Innovation, for example, were all working towards shared goals of supporting and enabling the creativity and sustainability of the social sector. Nevertheless, to highlight our contribution, we focus on the work of our teams.

Working in the MaRS ecosystem, Allyson Hewitt, director SiG@MaRS, noted that encouraging the Ministry of Economic Development and Innovation (MEDI) to adopt social innovation and social finance meant recognizing the ministry would narrow it to the world they knew: enterprise. Yet, it was critical for MaRS to engage this partner and significant funder of its advisory service program as Ontario showed significant leadership in supporting SiG@MaRS.

IN 2017, MEDI BECAME THE MINISTRY OF ECONOMIC DEVELOPMENT & GROWTH

Fortunately, Hewitt had more than one champion inside the government. John Brodhead, the nephew of former president of the McConnell Foundation Tim Brodhead, worked in the premier's office "and he knew the potential [of social innovation]," Hewitt said. "He was very excited about MaRS and he knew the province wanted to ensure that social entrepreneurship was predominant."

Helen Burstyn, former chair of the Ontario Trillium Foundation and advisor to government, was also working the agenda from inside and became a key partner and intrapreneur in this space. Burstyn was creating space for an initiative that would engage the province in hearing from and working with Ontario's social sector. The Partnership Project, as the initiative became known, was co-chaired by Dr. Eric Hoskins, then Minister of Citizenship and Immigration for Ontario. It was tasked with getting input and advice from social sector representatives on ways government could strengthen its partnership with the sector. With a mandate to collaborate more intentionally, teams inside and outside government next worked to convene the province's first Social Innovation Summit in 2011, bringing together representatives from the political, business and non-profit sectors to discuss how they could leverage collaborations to create new solutions for pressing problems in Ontario.

Provincial ministers Glen Murray, Research and Innovation; Dr. Eric Hoskins, Citizenship and Immigration; and Laurel Broten, Children and Youth Services joined forces at the summit to push forward social innovation. The summit led to the development of a social innovation policy paper, using a publicly editable wiki that thousands of Ontarians contributed to in the months leading up to the summit.

While the summit alone did not ensure social innovation became a policy objective, by fostering relationships across ministries and allowing ministers to lead the agenda while informing their direction, it contributed to more receptive conditions for social innovation ideas in each of the three key ministries.

Much of our work advanced through combinations of relationships inside government, listening for receptivity and convening small and large events to bring participants further along. In Ontario, the creation of the MaRS Centre for Impact Investing and a growing cultural awareness around social enterprise helped lead to the launch of the Office for Social Enterprise at the then titled Ministry of Economic Development, Trade and Employment.

Nova Scotia

In 2010, Tim Draimin saw a window of opportunity on Canada's East Coast in intrapreneur Arthur Bull, a community economic development activist hired by Rick Williams, deputy minister to the premier of Nova Scotia, to assist in advancing community strategies with the province's new government. The moment was ripe to build on existing momentum in the province: "We were also building on assets [Nova Scotia] had already present in the form of the Community Economic Development Investment Fund," Draimin said, referencing a successful model that helps communities blend local capital and grassroots business development to invest in local business.

SiG committed to bringing the entire SiG partnership to Nova Scotia for a provincial social innovation conference, connecting with long-standing allies and partners, such as Susan Szpakowski [formerly with the Institute for Authentic Leadership in Action (ALIA)], Danny Graham (lawyer and prominent civic leader), and Bull.

The Social Innovation Conference ran parallel to ALIA Institute's annual summit, which brought people from across North America to Halifax. The SiG partners provided social finance workshops and social innovation presentations. Bull arranged for Etmanski and Draimin to meet with the minister of finance and a range of senior officials. The combination of shared learning and relationships laid the groundwork for the province to create a social impact bond working group and, subsequently, Canada's second public benefit incorporation form, the Community Interest Company.

Other initiatives started at this time were: a provincial social innovation lab for an inside-of-government competition developed by Julia Sable, a member of the Nova Scotia public service who had participated in the Graduate Diploma in Social Innovation at the University of Waterloo; and Engage New Scotia, a provincial social innovation virtual network linked by events and a newsletter.

Other players in Nova Scotia included Richard Bridge, a lawyer who helped with hybrid corporate legislation, among many other social purpose projects, and David Upton of Common Good Solutions who helped accelerate the success of social enterprises in Nova Scotia.

Laurel Broten, Ontario Minister for Child and Youth Services at the Social Innovation Summit 2012 (Photo courtesy of the Government of Ontario)

British Columbia

Policy momentum in British Columbia cannot be discussed without mentioning Sean Moore's tips for moving policy agendas forward.[97]

Tip 3: Advocacy Asset Management: Building Political Capital

Every organization has varying amounts of political capital. Strategically, for the organization, the important thing is to view political capital as an asset without which little can be achieved. What is meant by political capital? By my definition, it includes:

* Individual and institutional/corporate reputations;

* The organization's traditions, icons and myths;

* The organization's accomplishments (particularly in being able to demonstrate that it can work successfully with government); a supportive membership;

* Specific expertise within the organization or a history of dealing with data that is relevant to the public policy issue;

* Contacts at the political and bureaucratic levels;

* The ability to support and help other organizations.[98]

Etmanski and Vickie Cammack, co-founder of the Plan Institute, had healthy stores of political capital built during years of community organizing and relationship development. They had strong reputations in the disability movement and a track record of success in the development and scaling of PLAN; the organization's large membership made it politically significant as well. Etmanski and Cammack had a deep understanding of issues affecting people living with a disability and their support networks and could tie this understanding to systemic issues with which politicians could relate.

In particular, they had strong ties with the Ministry of Social Development and public servants within its departments, in keeping with Moore's final tip: "In most governments, most of the time, 90 per cent of the issues are actually decided in a government or a department and are simply ratified or fronted by the minister. Unless you have been successful in making your case with ministry officials or the political staff who advise the minister, you will likely not be successful in your efforts." It's not enough to have the ear and understanding of a government minister.

In advancing SiG's social innovation agenda in B.C., Etmanski and Cammack were able to build off of the highly successful introduction of the Registered Disability Savings Plan. By 2011, the curating work of Etmanski led to the world's first Minister of Social Development and Social Innovation and the B.C. Social Innovation Council, a multi-sectoral group designed to help the government support social innovation.[99]

The council was appointed in January 2011 to make recommendations to the parliamentary secretary for Non-Profit Partnerships and the minister of Social Development and Social Innovation "on how best to maximize social innovation in British Columbia, with an emphasis on social finance and social enterprise."[100] Etmanski engaged Molly Harrington, assistant deputy minister, a receptive partner inside the government, to co-chair the council. The council incorporated the spirit of and many of the recommendations outlined by the Canadian Task Force on Social Finance.

The council presented a summary of its findings and an action plan to the B.C. government in April 2012. Its recommendations focused on five areas: supporting social enterprise; legislative enablement; social innovation labs; engaging communities; and learning and research. To implement this plan, it proposed creating the B.C. Partners for Social Impact, a diverse network of leaders in government, non-profit organizations, businesses, universities and community groups, to collaborate to improve

social outcomes for British Columbians. This inclusive approach to policy development and deployment resulted in near-complete adoption of the recommendations.

Key Recommendations at a Glance

Supporting Social Enterprise	Legislative Enablement	Social Innovation Labs	Engaging Communities	Learning and Research
Social Enterprise Investment Tax Credit	Community Contribution Companies	Social Innovation Labs start-up in B.C.	BC Ideas Competition and Change Shop	Community-Based Research and Learning Network
Procurement to support Social Enterprise	Engagement with provinces and federal government to support non-profit and charitable sector		Build Social Innovation capacity in First Nations Communities	
Social Impact Bonds			Establish Partners for Social Impact	
Social Enterprises include in SME programs and supports				

These recommendations are mutually reinforcing and support the entire process of social innovation from inspiration to generating new ideas and proposals, then prototyping and pilots, through implementation, scaling and systemic change. Most important, partnerships among government, business and community have already emerged around each of them.

Action Plan Recommendations to Maximize Social Innovation in British Columbia — March 2012 | BC Social Innovation Council, Government of British Columbia

Alberta

The policy journey in Alberta is notable for its differences. Draimin met Wayne Chiu, executive chairman of Trico Charitable Foundation, when Chiu joined a Social Innovation Roundtable Draimin was hosting at a Philanthropic Foundations Canada conference. Their working partnership began when Chiu invited Draimin to join Trico's board. That partnership led to SiG, MaRS and the McConnell Foundation supporting Trico's hosting of the 6th annual Social Enterprise World Forum (SEWF) in 2013, the first time it was hosted in Canada. The forum, held in a different city each year, gathers hundreds of people from around the world to share stories of impact, latest practices

8

and lessons from the field. This partnership "meant we were able to offer Trico content suggestions for the forum and contribute a social innovation frame," Draimin said.

Etmanski was the opening keynote speaker. He illuminated the connection between social enterprise and social innovation and encouraged participants to see themselves as part of the innovation ecosystem. Draimin contends the integration of social innovation into the program strengthened content and helped inspire the political leadership participating in the forum, which included Alison Redford, then premier; Dave Hancock, then deputy premier who later became premier; and Jason Kenney, then federal minister for Employment and Social Development Canada.

Instead of holding its annual Social Finance Forum, MaRS co-hosted an impact investing pre-day event in Calgary as part of the Social Enterprise World Forum to take advantage of the unique opportunity to leverage a global and national audience. A smaller policy-focused discussion took place outside of the official program to help deepen relationships and gain insights. Taken together, these collective program activities and experiences played a role in the establishment of a $1-billion Social Innovation Endowment Fund in Alberta, the first such model by a government.

"This event triggered a great deal of discussion and interest in senior circles about new and creative ways to support work on a variety of government priorities ... When the decision to establish a Social Innovation Endowment was made in early 2014, the Ministry of Human Services contracted SiG to provide technical support in the design of the new entity," Leann Wagner, former executive director for Strategic Policy Initiatives at Alberta Human Services, recalled.

> **The direct support from SiG helped us work through a variety of design issues in the endowment (e.g. governance, objectives, staff capacities). The people in the SiG network have a lot of experience with social innovation in general, and investment into social innovation in particular. They also have an extensive network of partners with social innovation experts from across the world (e.g., Nesta in the U.K.) that we simply cannot easily access or have time to develop. Working with SiG dramatically reduces our learning curve on building this new type of funding mechanism.**
> **— Anonymous**[101]

The combination of a dramatic drop in global oil prices and successive leadership crises caused the legislation to be reversed before the endowment produced spendable income. Despite that setback, SiG continued to work with a provincial tri-ministerial team and Alberta CoLab, supporting capacity-building across the government, placing the province in a position of leadership. This work included the ABSI Fellows work cited in other chapters.

National

On the national landscape, SiG spent the past 10 years developing policy recommendations, pursuing interest in relevant recommendations from the Task Force on Social Finance and engaging in various consultations. For a time after the task force, Diane Finley, then federal minister of Employment and Skills Development, hosted an advisory council on social innovation, on which Etmanski and Tim Brodhead, former president of the McConnell Foundation, served. Later, Stephen Huddart, current president and CEO of the McConnell Foundation, joined the successor council convened

by Jason Kenney, then federal minister of Employment and Social Development. When the Liberals took office in 2015, SiG saw a window of opportunity in the Trudeau government's announcement to develop an inclusive innovation agenda, as well as a social innovation and social finance strategy.

Profile
The Registered Disability Savings Plan

The Registered Disability Savings Plan is an example of a Canadian cross-sector social innovation. The RDSP was designed to support financial inclusion and subsequently provide long-term financial stability for people with disabilities and encourage contributions without clawing back disability benefits. It required regulatory change and championship at the federal government level and the engagement of all mainstream banking institutions. The RDSP is frequently cited by the SiG partners as an instructive and contemporary social innovation, drawing on various aspects of social entrepreneurship, intrapreneurship, relationship building and strategic inquiry. The key to this innovation is remembering that while the financial product makes sense for the banking sector, its innovation lies in the transformation from a perpetual state of benefit assistance to an independent life for people living with a disability.

When Innovation, Science and Economic Development Canada extended an invitation to Canadians to contribute to the drawing up of a new inclusive innovation agenda, it appeared that the opportunity to incorporate social innovation as a cornerstone of innovation had arrived.

Bringing this point home in his 2017 Philanthropist article, "Seven Year on and Seven Years Out," Stephen Huddart, wrote, "while the value of innovation in business, science, and technology is widely championed and generously funded, considerably less attention is paid to applying innovation tools to the social systems that cost government more than $300 billion a year. This is not some neo-liberal wolf in sheep's clothing. Improving outcomes for vulnerable people; creating agile, responsive institutions; and unlocking capital that is currently absorbed by service delivery models that worsen the problems they were intended to solve (as is the case with some incarceration practices, for example), are goals we can all support, and which social innovation is designed to achieve."[102]

Erika greeted by Prime Minister Harper
(Photo by Cindy Frostad)

8

Yet, public policy consultations on Canada's Innovation Agenda in 2016 to 2017 struggled to make the vital connection between Canada's unique strengths, the urgent complexity of contemporary challenges facing Canadians, and the opportunity to define innovation as the integration of STEM, business, arts and social innovation. In Innovation, Science and Economic Development Canada's summary report, "Innovation for a Better Canada: What You Told Us,"[103] there is a terse, high-level evaluation of the innovation ecosystem. It hews to the old mindset, with the important exception of making a strong link between innovation and a greener economy.[104]

"I think we're seeing the limitations of government," Brodhead said. "It's constrained by a public service that is now so mired in process and accountability and protecting, that the incentives are basically to do nothing. All the rewards are to stand still." Brodhead contended the default position once people give up on government is to let the private sector look after it, or philanthropy.

"We play into that narrative by vaunting Bill Gates and George Soros. This notion that these people can somehow come up with solutions when government can't. It's not that they — Gates and Soros — can't come up with innovations and new ideas, they can. But to apply these on the scale required, I don't see it frankly," he added.

While SiG's partners weren't surprised by these challenges, the imperative and the opportunity seemed to align. There was disappointment but not disillusionment.

In the final year of SiG, a new opportunity presented itself in the form of a steering committee convened by Economic and Social Development Canada, to co-create a social innovation and social finance strategy. SiG principals Allyson Hewitt and Stephen Huddart were appointed as two of the 17 members. A key objective of the committee will be to help the government realize the strategy needs to cut across ministries if it is to succeed.

"There is a much-changed policy and public service environment since 2007. In addition to offices and public service innovation labs opening at every level of government across the country, a lot of the people with whom we've worked over the past decade, in the environment field, in social innovation and the cultural sector, have now left the charities that they've been running and they've gone into government. They've arrived and are turning back to McConnell, to SiG and its partners and saying, could you come in and talk to us, can you work with us to speed things up?" Huddart said.

Both Huddart and Draimin remind us in their contributions to this book of the opportunity to inform the innovation agenda moving forward. And as always, Al Etmanski reminds us of the much-needed ability to recognize ourselves in the problems we hope to help solve.

"Working with the status quo is not the usual practice of fervent advocates, community organizers and social innovators. Perhaps because it is outside your comfort zone. Or you risk criticism from your peers. However, the status quo is not outside us, but within us. Once you recognize that reality you will breathe new life into your advancement of social, economic and environmental justice," wrote Etmanski in *Impact*, who continues to offer thoughtful advice to passionate community organizers around the world.[105]

Jason Kenney, Minister of Citizenship, Immigration and Multiculturalism speaks at the Social Enterprise World Forum 2012 (Photo by Geraldine Cahill)

Molly Harrington and Ken Gauthier open Day 3 of the SIX Summer School 2014 (Photo by Komal Minhas)

I'm not the centre of your universe?

When you're in the weeds of your own innovation, community organization or peer group, it can be hard to remember that at the policy level, there are multiple competing priorities vying for attention. Listen early; understand where the energy is; and watch for links to your issue that can also support your public service collaborator.

Bridging and receptive innovators, please stand up

The work of social innovation is necessarily and gloriously diverse, requiring the skills and assets of all kinds of actors. In 2013, community organizer Al Etmanski put names to the roles he believed could help people identify their unique contribution: disruptive, bridging and receptive innovators. SiG could not have done what we did without the bridging and receptive innovators inside and across government departments who were chipping away at the risk-averse culture inside the public service, while helping create new pathways for ideas to flow in.

Hurry up and wait

One could easily argue that the characteristic risk aversion of government is a good thing under many conditions — for example, during international conflict. Yet it can be extremely frustrating for the passionate changemaker or movement. Be prepared for the long haul and inevitable changes in priorities and messaging. Adaptive capacity and endurance are your friend.
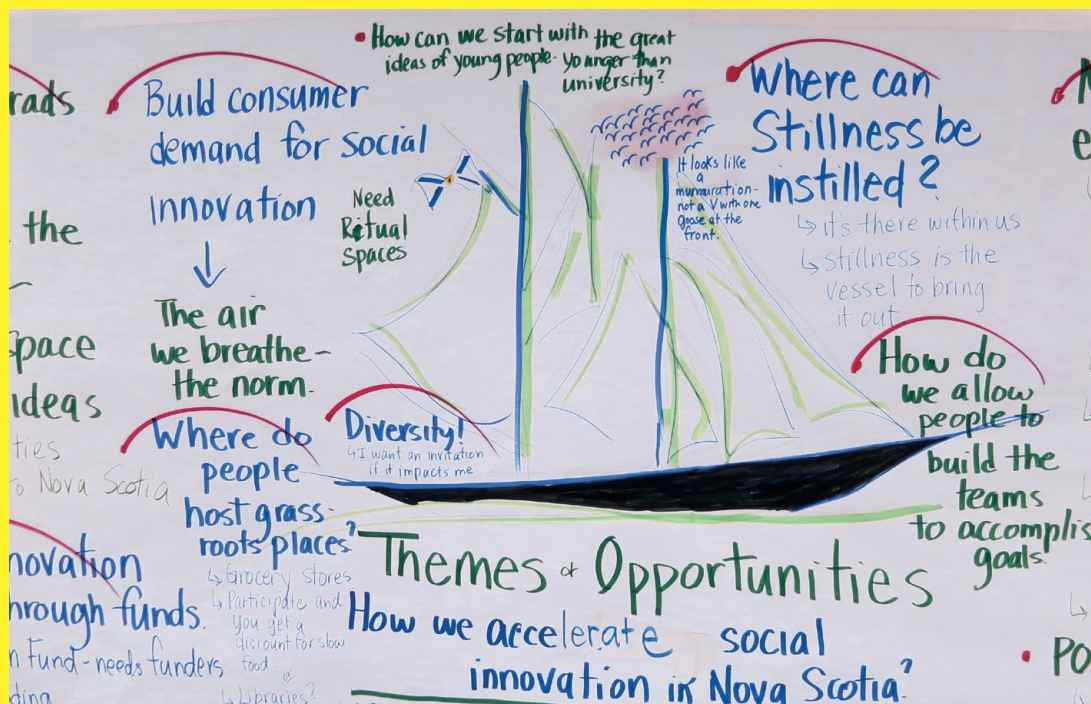
ALIA Institute graphic note taking, 2010 (Photo by Tim Draimin)

RELEASE

Chapter 9

The shadow side: Silver bullets sell

Social innovation is not a fixed address. When we first started talking about social innovation, there was a lot of debate on whether we should talk about sustainable solutions or not. Coming out of a business environment background, I worked a long time with the language of sustainability. But sustainability, for many people, has that fixed notion. "I see this problem, I figure out how to fix it, I fixed it and it's gone."

It is a longing. It is almost a utopian longing. But the world doesn't work that way.

—

Frances Westley, J.W. McConnell chair in social innovation at the University of Waterloo[106]

There is a semantic battle over the term "social innovation:" its definition, who uses it, whether it should be used at all. But the fight raging below the surface of semantics is whether social innovation is "simply privatization in a socially acceptable form," as Dr. Andrew Curtis and Tara Anderson suggest in their second of three articles on social innovation that appeared in *Pioneers Post* in 2014.[107]

← CO-FOUNDERS & DIRECTORS OF THE DRAGONFLY COLLECTIVE, AN AUSTRALIAN SOCIAL VENTURE

This is a real concern as social innovation gains notoriety as a silver bullet — social innovators will solve the problem better and quicker, with measurable impact and cost-saving efficiencies, hacking current systems' responsibilities with band aids and false promises. This view of social innovation is a mindset of dangerous longing for a perfect and static end state, at best, or a purposeful offloading of responsibility at worst.

In his 2017 *Philanthropist* article "Seven Years On and Seven Years Out," Stephen Huddart, president and CEO of the McConnell Foundation, acknowledged the rise in critiques "that social innovation was becoming synonymous with 'social change lite,' emphasizing process over outcomes, and bypassing serious, sustained work on social justice issues."[108] As evidence, he pointed out that "the Young Foundation in the U.K. — one of social innovation's early champions — began to use the phrase 'disruptive social innovation' to put a sharper edge on what was becoming a fuzzy concept applied to almost any incremental change."[109]

Social innovation flirts with faddism. As certain elements of social innovation gain ground over others in public discourse — process over outcome, the heroic entrepreneur over collaborative community; invention over bricolage; quick wins over transformational change; solutionism over asset-based approaches; disruption over impact — the contorted result is another tool that fits quietly and readily into our existing paradigms, changing little.

In his 2017 blog post,, "The Face of the 'Other,'" community organizer Al Etmanski called out the dehumanizing trap of solutions taking precedence over a connection with reality. "The more removed we are from the dilemmas, predicaments and conditions people face, the more impersonal our relationships and the more dehumanizing our institutional and advocacy responses," he wrote. "We can create perfectly designed solutions without having to stay around to experience the consequences over the years. We can rely on others to implement solutions who are even more removed from the actual circumstances. We can overshadow those who directly experience the challenge and then leave them to pick up the pieces. We can walk away whenever we want."[110]

Losing ground

It is tempting to make social innovation fit to purpose, simplifying the concept to fit our current understanding; yet, social innovation is actually fit for a purpose — giving us the tools to expand our understanding and see a problem in its complexity. If complexity is removed as a cornerstone of social innovation, it becomes "a false invitation and a false hope for folks. You know: [if] we could just all operate together, work together, [it] is going to be good. That's naive and it's just not enough! And you know who would say that the fastest is the people suffering the most in this country," Cheryl Rose, former director of programs and partnerships at SiG@Waterloo, said.

Innovation is sexier than complexity. The novelty of it fits with the technological revolutions underway and the promises of quick wins, savings or impact. By championing the importance of innovation, SiG inadvertently contributed to a growing obsession with novelty. "There is now a culture which celebrates innovation almost to an excess. Nothing is worth doing unless it's new … which is ridiculous. But the question we never asked, because I guess we knew we were all on the same wavelength,

9

was: 'Innovation for what?'" Tim Brodhead, former president of the McConnell Foundation, noted.

That is the key question. In "Seven Years On and Seven Years Out," Huddart reflected on a previous *Philanthropist* article, which he wrote in 2010, and pointed out his own naivety in focusing too much on process. While he celebrated the enormous potential of technology for collaborative social change in 2010, by 2017 he was quick to acknowledge that enormous potential may be equally used for private interest. "Now that Google and Facebook make profitable use of the massive amounts of data that we freely offer up about ourselves, the hard question we have to ask is, 'When free comes at a cost to freedom, what are social innovators going to do about it?'" he wrote.[111]

Why?

Understanding the incentives, interests and, above all, values driving social innovation helps illuminate its integrity. In other words, how closely does an innovation align with the true intention?

At SiG, we understood social innovation as the tension between vulnerability and resilience. Social innovation is intended to reduce the conditions creating vulnerability and enhance people's capacity to influence change. This perspective grounded our value for innovation as an activity "sprouting from a mix of necessity and care," Etmanski said. It necessarily engages with vulnerability — our own and others.

In the opening panel discussion at the 2014 SIX Summer School in Vancouver, Frances Westley, J.W. McConnell chair in social innovation at the University of Waterloo, emphasized that "vulnerability becomes creative and builds social innovation only when engagement happens. It's not about individual elements, it's the relationships between them. It's not about too much vulnerability, it is about vulnerability isolated … vulnerability cut off."[112]

Put another way, social innovation is a journey of engagement with the "self" and the "other" — the challenging road to reconfigure our relationships with each other and the planet, Etmanski noted in "Face of the 'Other.'" "Social innovation doesn't have to be about ever more ingenious ways to 'sample' a problem experienced by a group of people. It could be about committing to the mystery and complexity of our relationship with the 'other.' Methods, design, statistics, data, programs, causes and professionalism are all enlightened by that kind of love," he wrote.[113]

Each of the SiG partners embedded this philosophy in their work in ways inter-twined with their identities.

Darcy Riddell, director of strategic learning at the McConnell Foundation, referred to it as the "important relationship between personal development and our ability to be more fully and authentically participating in complex systems and complex systems change." To emphasize the importance of this depth of self-awareness and under-standing, she quoted Thomas Merton, an American Trappist Monk: "If we attempt to act and do things for others or for the world without deepening our own self-under-standing, our own freedom, integrity and capacity to love, we will not have anything to give to others. We will communicate nothing but the contagion of our own obsessions, our aggressiveness, our own ego-centered ambitions."

Etmanski dedicated an entire chapter of his 2015 book *Impact: SIX Patterns to Spread Your Social Innovation* to the importance of self-identity, awareness and values. "Pattern Six: Who Is as Important as How" explored how social innovation springs from the depths of self, struggle, and love. "An undue focus on how we do social innovation creates the impression that it's a specialty we must be trained for. Instead, social innovation is enlightened by who we are — by character, not technique.

TECHNOLOGY IS OFTEN SHAPED BY THE ASSUMPTIONS & INTERESTS OF ITS DEVELOPERS, DRIVING SOCIAL INNOVATORS TO CREATE THEIR OWN TECH & SOFTWARE OR ENGAGE IN CO-CREATIVE PARTNERSHIP

The conviction of today's social innovators arises from their emotional and spiritual maturity. They pay attention to what nourishes and replenishes their spirits. And they have the humility to admit their limitations and fears," he wrote.[114]

It certainly wasn't only the SiG partners who valued self-identity and self-knowing. It is a pervasive challenge and call to action in a time of reconciliation in Canada. At the Suncor Energy Foundation's social innovation Gathering in 2017, Blackfoot Elder Casey Eagle, of the Blood Tribe in Southern Alberta, told participants to "create yourself and who you need to be so that you are contributing what needs to be given to humanity."

Yet, it is this beating heart of emotional acuity that is often least attractive to institutional uptake. In North America, individualism takes precedence over community; independence over interdependence, and vulnerability is seen as weakness. Stripping out the touchy-feely elements of social innovation to inform a professional uptake of "good process" in mainstream institutions drives the "social change lite" reputation Huddart identified.

WHERE WESTERN SOCIAL NORMS DOMINATE SOCIAL, POLITICAL E ECONOMIC LIFE.

While SiG articulated a clear what (systems change) and why (to reduce vulnerability and enhance resilience) of social innovation, we did not adopt a common values statement across the partners.

> We assumed that when we talked about innovation, we were talking about progress and good values and the rest of it. You know, we're seeing some innovation now and it's not necessarily for the better. So being a bit more focused on what constitutes a better way of living ... in terms of environmental conservation, human values, we can't just assume we all agree. We don't.
>
> [Questions] we posed to ourselves at the foundation are "Whose lives are getting better as a result of this? What imbalances are being corrected? What injustices are being resolved?"... if social innovation is not about the most vulnerable people and about changing or improving broken systems, then it has no business opening its mouth. The ways we go about effecting social justice goals are different than the combative, left-right conversations that characterize a lot of work in our sector. The collective impact approach to poverty reduction brings together all sectors, including people living in poverty...and works at intentionally, and in a focused way, dismantling barriers, creating better pathways out of poverty...
>
> In that sense, there's a body of work that's linked to, or influenced by, the social innovation portfolio that's very much about giving people the capacity to learn, innovate, and build better models, better approaches. It's about developing the tools, putting them at the service of people that are trapped in systems that are dysfunctional. That's not only people [who], from a social welfare system perspective, are vulnerable, but also people that hold that

9

> **[system] together; the people who are in the poverty serving capacities. Here you are holding the status quo — working with all of those elements to change all of the dynamics. [Social innovation] is disruptive of all of the dysfunctional processes. —Stephen Huddart**

Social innovation is disruptive. And the goal of that disruption is to right injustices and imbalances to improve the lives of vulnerable community members. With systems change at the heart, there will be conflict and disagreement. If there is no opposition, then odds are we are preaching to a small choir at the altar of our own status quo.

Unintended consequences

Social innovation processes bring conflicting parts of a system together to create the conditions for collective innovation to reframe and shift the balance of power and resources. It requires challenging power structures, deeply held assumptions, self-interest and discrimination. There is a rich pool of frameworks and tools to leverage diversity — and potential conflict — into collaborative systems innovation. While the benefits of diversity and collaboration were explored in previous chapters, they are, perhaps above all, imperative to mitigate unintended consequences and outcomes, because "social innovation is not a fixed address."

> **A really good concrete example that I learned from someone working in the homelessness initiative in the U.S. was one where they decided that they were going to tackle the most pressing manifestation of the problem. In New York, it happened to be young, unemployed males who were living on the streets. Their surveys showed the largest percentage of the homeless were in that group, so they said, "let's address that." They zeroed in and asked "What do these people need? What are their particular issues? How can we create certain kinds of housing or work arrangements that meet their needs?" And they were very successful. They began to pull large numbers of these people off the streets and then they started to notice that violence towards street women was going up astronomically. They didn't know that having young men on the street was a deterrent to violence to street women, but they suddenly discovered a new problem because of their solution to the last problem. That's what it's like.**
>
> **...There isn't ever a resting place. Just as you are coming up to your triumph of solving the problem, if you are still aware of where the blind spots are, where the unseen things are, if you have that gift of seeing the unseen thing, you suddenly say, whoa, there is a whole new set of unseen things that are presenting themselves and we have to address those. —Frances Westley**[115]

In focusing on sharing our insights, lessons, frameworks, approaches and resources, the goal of the SiG partners was to broadly empower people's capacity to engage in social innovation with integrity, wisdom, fidelity to values and community, and strategies to learn the way forward. While it will never be the same path twice, we can limit how far we misstep.

Reach

There is great value in thoughtful critique, especially as a means of personal or organizational development, whether that be reflective practice, self-awareness, or feedback loops. But critique can be paralytic, if not balanced with an asset-based approach — a teasing out of strengths, sincerity and care to help move from critique to action. In their 2006 book *Getting to Maybe*, Westley, Brenda Zimmerman, and Michael Quinn Patton make clear the danger of repressing either all of our strengths or all of our faults: "When an individual behaves in a way that is either too good or too bad it suggests that he has repressed, edited out, or rejected parts of his human nature. Both the bully and the saint have lost a sense of proportion."[116]

In a presentation to the inaugural Indigenous Innovation Summit in 2015, Westley introduced a reframed version of her approach to social innovation, using four principles:

1 Reach out. Combine what we are trying to do with others;

2 Reach up and down. Be prepared to connect/create windows for local innovation as well as policy;

3 Reach deep. Build on the rich culture that is already there;

4 Reach with care. Do what calls to you with people you care about; don't expect perfection, but remain tenacious; set boundaries for yourself.

The shadows of social innovation burst forth when we tire of holding the tensions between tenacity and humanity; self and system; process and outcome. JUMP Math founder, John Mighton, calls on us to keep hold of the tension: "We are meant to be in a state of wonder. Wonder and a state of abject humility at the same time," he said.

JUMP Math in the classroom (Photo courtesy of JUMP Math)

9

Privilege people over process

No process, regardless of how clever or well-delivered, is as important as ensuring you maintain connection with and the participation of those whose lives are most vulnerable in the system you are wanting to shift. Stay grounded. The processes are instructive, but community is your real guide.

The nemesis is you

Hubris is a rotten companion; jumping in front of you when you need to see yourself and your role in a system. Taking the time to understand yourself will enable a more authentic and helpful contribution to any change strategy.

Be awake to unintended consequences

Being inclusive and systemic in your approach when developing a potential social innovation will help mitigate the possibility of negative consequences downstream. Embrace conflicting contributions from the community as early as possible so that you can all come into a more informed understanding of the systems you want to change.

JUMP Math in the classroom (Photo courtesy of JUMP Math)

The critical role of Traditional Knowledge in social innovation

By Melissa Herman, ABSI Connect Northern Fellow,
with inspiration from Al Etmanski, community organizer

Melissa Herman

Al Etmanski

Treaty 8 territory is home to the Dënesųłiné and Cree people, the Regional Municipality of Wood Buffalo and Canada's largest oil deposits. During the summer, berries grow in the northern boreal forest, not far from oil refineries, tailings ponds and reclaimed land. There is a thin line between these two worlds. It is a line many people tread on both sides of the divide, including myself. I am a Dene mother and daughter.

I sometimes feel like I am about to lose the delicate balance I keep. I am driven by a sense of duty, knowing that if I lose focus, the worlds will stay divided. For the past 12 months, I have been a Fellow with ABSI Connect, a unique initiative seeking to identify and amplify social, economic and ecological impact initiatives that are successfully challenging the status quo in Alberta. Specifically, I am working as the Northern Alberta Fellow, providing insights into the dynamics of Indigenous communities, both rural and urban. The desire for change in these communities is producing significant ideas at a grassroots level, rooted in Traditional Knowledge.

I recognize that the distance between the worlds is not one of length or time, but language. Being an ABSI Connect Fellow gives me the opportunity to dive deeper into this intuition, because creating new solutions to complex social problems is embedded in Indigenous people's way of life. We are very communal. My mother always tells me, "If you have more than one, you have enough to share." We believe what affects one person will eventually affect another and keep this in mind with every decision.

Social innovation has the potential to bridge Indigenous and western cultures and create a brighter future for all. Ingenuity, creativity and innovation are embedded in Indigenous culture — we have always invented new ways to flourish in poor conditions. I believe that the rest of Canada, and the rest of the world, can benefit from a better understanding of Indigenous social innovation.

I have been exploring the concept of social innovation with Elders. In Dënesųłiné, social innovation means "to see from my position or perspective." In Cree, it means "to change the way I see things." These reveal a depth of understanding about social

innovation not commonly found in western definitions. Both translations suggest social innovation is primarily about relationships and communication and less about the actual invention or implementation process.

In theory, a reconciled relationship between Indigenous people and Canadians would put us on the path to resolving current challenges, such as broken treaties, missing and murdered Indigenous women, inaccessibility to clean water, inequitable access to mental health services, and the high number of Indigenous children in government care.

However, the government of Canada's history with Indigenous people has left us with a lack of confidence and sense of mistrust in the health care, educational and justice systems. Social innovation requires mutual respect and understanding. It cannot be a new imposition.

Finding our way through the tensions, I have encountered two challenges to bridging the divide between cultures and understanding:

One: It is part of Indigenous culture to pass on Traditional Knowledge orally; a common concern is that, when recorded, documented and shared exclusively, Traditional Knowledge loses authenticity. Who tells what story is determined by the keeper of the story, often an Elder. Elders decide who is fit to tell a story, to ensure its moral is carried on. The concern stems from the possibility of a story being changed along the way by someone with intentions other than keeping the moral. Sharing the story for profit, for example.

Two: Language barriers make mutual understanding challenging. The term "industry," for example, is commonly used when consulting Indigenous people in Treaty 8. In Dënesųłiné, this translates, according to an Elder from south of Wood Buffalo, to "destruction, loss and extermination." A Cree Elder who lives in the heart of the region's oil sands gave me this translation: "profit, progress, growth." These different translations create tensions when time comes for industry to consult and work with Indigenous people or when creating solutions that respect the cultures, heritage, well-being and livelihoods of Indigenous people.

Wood Buffalo National Park (Photo by Dancestrokes)

During my time as an ABSI Connect Fellow, I wondered if a place to start building bridges was to discover a common language through which we can build empathy with each other, find a common goal and work towards it together — urban and rural, Indigenous and non-Indigenous. A common language would foster mutual understanding for significant words, like "success" and "justice," to clearly articulate shared goals, such as bringing justice to the thousands of families of missing and murdered Indigenous women or what we mean by "high quality of life." A common language would help restore trust and guide us on a path of reconciliation.

I have been encouraged by the social innovation conversation among Indigenous people and non-Indigenous people in Wood Buffalo — people like Cheryl Alexander, who is Indigenous to Treaty 8 and focuses her efforts on cultural awareness training for industry, or the team at the Fort McMurray Multicultural Association, which encourages Indigenous people to preserve their cultures, within a Canadian context. In its efforts to promote inclusion, the Multicultural Association reached out to me to discuss what I had also recognized: Indigenous people were lacking a literal voice in the justice system. Until recently, the courthouse in Fort McMurray, the largest urban population in Wood Buffalo, did not have an Indigenous translator, leaving Cree and Dene speakers caught up in the justice system frustrated and misunderstood. Now, following outreach to the courthouse, the Fort McMurray Multicultural Association provides a Dene translator to the courthouse, resulting in improved communications between defendants and the justice system, as well as several people being released from custody. In the process of reconciling and healing the relationships between the justice system and Indigenous people, jobs were created for Dene speakers and two service providers — the courthouse and the Multicultural Association — deepened their understanding of the critical importance of language.

This is an example of social innovation. There was an expressed and systemic need, rooted in a complex challenge in Wood Buffalo, which was heard and addressed by determining what in the system needed to change; what was needed of the system was determined by those who the system is designed to serve. More of this type of innovation will help build empathy between non-Indigenous and Indigenous people.

The 2015 Indigenous Innovation Summit, hosted in Edmonton by the National Association of Friendship Centres, exposed me to many more Indigenous innovations and innovators like the ones I've been amplifying in Wood Buffalo. I learned how, without losing authenticity, our tradition of storytelling is being extended to digital platforms, like Ryan McMahon's Red Man Laughing podcast. I was exposed to an array of Indigenous people who balanced Indigenous and non-Indigenous worldviews with ease, able to hop back and forth, creating artifacts to help others hop with them and collecting and sharing ideas. I was humbled to meet Paul Lacerte and his daughter Raven Lacerte, founders of the Moose Hide Campaign, and to bring the Moose Hide Campaign to Wood Buffalo to amplify the message that the power to reduce violence against women is in the hands of men.

Transformed relationships — between men and women; Indigenous and non-Indigenous communities; and across generations — is the guiding spirit common to many Indigenous innovations and my focus in Wood Buffalo. It is inherent in how social innovation is understood in Dënesųłiné and Cree. We must continue to explore how new words — including reconciliation — translate into Indigenous languages. We must continue to pursue a common, authentic language, where the voice of Indigenous people is amplified and respected; where we control our own narrative, reducing misunderstanding and instilling in us a sense of pride and tradition. We must help everyone — Indigenous and non-Indigenous people — better understand the context from which each of us speaks. Only then can we start building empathy and bridge across the divides that isolate us from each other.

With a focused effort on shared understanding, Indigenous and non-Indigenous people can start having meaningful conversations and building trust. When trust is restored, collaboration becomes possible in unprecedented ways.

2015 Indigenous Innovation Summit (Photo courtesy of the McConnell Foundation)

Raven Lacerte and Justice Murray Sinclair at the 2015 Indigenous Innovation Summit (Photo courtesy of the McConnell Foundation)

Chapter 10

Communicating social innovation: Getting into the water supply

The most fundamental intellectual contribution SiG made was its definition, which I think is not even understood by us. It positioned social innovation as the link between vulnerability and resilience. That's a remarkably different perspective. First of all, it talks about the power of the powerless in effect. It talks about anchoring any of this work — whether in poverty, disability, violence — it says that's where one foot has to be. It's gotta be. The other is not to salvation, not to fixing, not to solving, not to sustainability — but to resilience; to continuous, evolving, adaptive capacity. Social innovation can help with that. To me, that's brilliant.

—

Al Etmanski, community organizer

SiG has benefitted hugely from Al Etmanski's creativity and way with words, the most memorable of which is his analogy for what a partnership should strive for in working towards culture change. It sounds a little sinister in its intent — getting into the water supply — but it's the same objective driving political, social and communications specialists the world over.

In 2004, linguist and cognitive scientist George Lakoff highlighted the power made possible by controlling the framing of an issue in his book, *Don't Think of an Elephant*. "Framing is about thought, about understanding at the deepest levels, about circuitry in your brain with strong synapses that last, about changing unconscious, automatic, effortless understanding — in other words, about changing common sense," he wrote.[117]

That is what SiG hoped to do when we set out to foster a culture of continuous social innovation in Canada. Doing that depended, in part, on how social innovation was articulated. People hearing our message would not only have to think social innovation was important, but also common sense. It was an ambitious goal on the face of it and we concede there is still much work to be done. Yet, there are positive markers to indicate that social innovation, as a concept and an outcome worth pursuing, is increasingly commonplace. This is certainly not solely attributable to SiG's work, but the partnership has influenced the frame in Canada.

There were various ways the partners developed and shared messaging, a struggle between communicating the complexity of the world and inviting a community to act despite it. None of the work was a slam dunk, but there are pieces that are useful.

Behind the scenes

The development of SiG's public-facing messaging and communications strategy was not truly underway until mid-2009. The early period was difficult — a struggle of and for ideas. In choosing to double down on a "culture of social innovation," instead of a particular social or environmental issue, we made the job of developing communications even more challenging.

Early on, a static website acted as a portal to the four partner sites. That shared website contained our definition of social innovation and a short description about who was involved in the partnership, but little more. It wasn't developed as a community tool or animated in any way. After a rocky start between 2006 and 2007, the partners largely turned inward to develop programming, feeding their progress to their own institution's communication channels.

This approach changed when the partners hired a communications coordinator to support collective resources development and messaging. At the time, social innovation was not a frequent search term in Canada, according to Google Trends.

GOOGLE TRENDS SHOW HOW OFTEN A PARTICULAR SEARCH TERM IS ENTERED RELATIVE TO THE TOTAL SEARCH WORLDWIDE
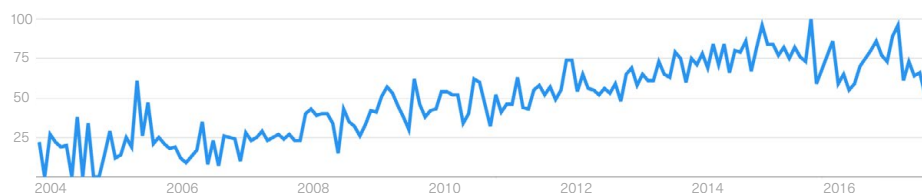
Trend line since 2004 of the term 'social innovation' in Canada (Google Trends)

To address this, the SiG National team coordinated the development of a Primer on Social Innovation and related concepts[118] — a glossary of terms meaningful to the partnership. This was useful both for external messaging and for the growing number of staff working at each SiG node and the national office. For many new staff, social innovation, social finance and social enterprise were not part of their lexicon.

Despite dipping our toe in the water with the primer, there was still tension the communication of SiG's work. The main bone of contention was the definition. Definitions serve multiple purposes, helping people understand ideas, as well as supporting the development of a field of work and giving it legitimacy. On the former, we struggled to gain traction outside our learning programs and convenings. Recognition of the definition's unique emphasis on vulnerability and resilience was often not highlighted in the beginning and the robustness of the definition drew criticism.

Allyson Hewitt had a hard time making the definition work in her work as director of SiG@MaRS. "I used it in my presentations but it didn't resonate with people at all," she recalled. "Here's my realization; people who are doing social innovation don't care what you call it. Academics, policy-makers, and funders do care. They need the categorization for their work, the practitioners often just get on with it."

While Etmanski valued the definition for its integrity, he learned to extract its value as a framework for action, rather than use it as a communication vehicle: "I would never try to sell social innovation. That's what I've learned. It does not survive on its own. The transformation of the concepts into language that is useful to the people that are confronting these tough, intractable problems I think is best done without using the phrase social innovation."

Yet, Frances Westley, J.W. McConnell chair in social innovation at the University of Waterloo, and other partners felt strongly that only in communicating the definition could its value be realized. "I don't think [social innovation] should be simplified," Westley argued, "and I think that when we look at all the programming that I've done, it's really been trying to bring people into harder, complex dynamics and trying to give them some tools that they can use to address those things. If you simplify it too much, you lose the notion of complexity and don't see what it really offers."

The SiG principals began to leverage the definition — or its meaning — differently with different audiences: academics, policy-makers, community leaders and funders. Tim Draimin, executive director of SiG National, called this approach "speaking to where they are listening." It reflected an emergent communications strategy that targeted leadership teams and apex organizations that could help broadcast our practices and tools, rather than trying to directly develop mass communications ourselves. SiG was not a mass movement-building partnership. Instead, we leveraged our particular resources — political, social and knowledge capital — to ensure leadership teams in apex organizations across sectors understood our work.

The lure of mass movement messaging would raise its head from time to time, but it was not our strength. Instead, tailored messaging to different constituencies, complemented by engagement with the mainstream media around specific projects, became our norm. To this day, tension around the definition and language used by the partnership remains, but this debate keeps the meaning present and front-of-mind in the exercise of generating outcomes and fertilizing the ecosystem.

Inspiring action for social impact

As articulated in the chapter on Convening, the Inspiring Action for Social Impact (IASI) series was a key mobilizing device, but it also proved to be a significant strategy for communicating social innovation in Canada. "A huge part of what SiG did, which was very helpful, was bring the international experts in. For me, that was a way of

[handwritten margin note: FRANCES WESTLEY WRITES OF HER INTENTION WITH THE DEFINITION AT THE END OF CHAPTER 1.]

[handwritten margin note: TALKING TO NETWORKS OF NETWORKS, FOR EXAMPLE: UNITED WAY OF CANADA, COMMUNITY FOUNDATIONS OF CANADA ETC]

grounding my understanding," Ilse Treurnicht, CEO of MaRS, said. "SiG led the way. They found the people who'd been thinking about these ideas and brought them here for an extended period of time, to expose them, not just to ourselves, but to key decision makers."

The IASI series, in conjunction with our two-page social innovation profiles, taught us that case studies and stories are pivotal communications tools; it was critical to translate and illustrate what social innovation looks like in reality. As heady as some of the SiG materials can be, exemplary stories helped open the door for many people; Roots of Empathy, JUMP Math, The Atmospheric Fund, Winnipeg Boldness — these are stories that show Canadians what the road to social innovation looks like.

Profile
Net Change

"When it comes to social and mobile technology, the question is no longer whether or not we should be using it, but how can social innovators use it to create greater impact?" Lisa Torjman, one of SiG@MaRS's first employees, wrote in 2009. Inspired by the transformative work of the Obama 2008 communications team and global movements such as 350.org, Torjman saw an opportunity for SiG@MaRS to showcase the mobilizing power of emerging technologies for social impact, a process and a movement she termed Net Change.

SEE TORJMAN'S 2010 MaRS POST, "TECHNOLOGY LEADING TO ECONOMIC & DEMOCRATIC PROGRESS"

Between 2008 and 2012, international and local guests spoke to packed auditoriums at MaRS Discovery District, launching with Canadian social innovation pioneer, Eric Young, who urged the audience to explore and experience the "shock of the possible." Dozens of speakers and training activities were hosted under the Net Change banner in subsequent years.

As SiG's collective capacity and resources shifted into other arenas, the McConnell Foundation picked up the mantle of Net Change, exploring a Net Change-inspired program — an online platform helping community organizations learn about, assess and implement social innovation approaches.

In November 2011, the first Innoweave workshop, Platformation, introduced cloud computing and new information and communications technology (ICT) strategies to participants. Today, Innoweave, a joint initiative of the foundation and its SiG partners, collaborates with dozens of organizations and practitioners across sectors to develop modules on practical tools for social innovation and host workshops.[119]

Events such as Net Change and the Inspiring Impact for Social Action Series connected the local social innovation field with leading thinkers in the areas SiG wanted to build profile and understanding and strengthened ties between Canada and the global social innovation community.

Coming out of the digital wildness

As the SiG partners developed their own resources, academic articles, white papers, webinars, blogs, profiles, case studies and more, it became clear that the importance of having four node websites and a national portal was outweighed by the need to represent the full body of work in one place. In 2012, then director of programs and partnerships at SiG@Waterloo Cheryl Rose proposed a single website to collate the resources in a way that was both accessible to people new to social innovation and useful to more experienced practitioners wanting to dive more deeply into concepts.

"The whole point of developing the website was to serve the people who were working toward social innovation," Rose said. The website, named the SiG Knowledge Hub, was a public-facing space to meet practitioners where they were: either early in their development or looking to go deeper. Introducing the site was a short introductory motion graphic, simply called: What is social innovation? "The motion graphic was really important to me," Rose continued. "I didn't want to launch the Hub without it. We needed to be able to say, this is what we're talking about. It was important which examples to use. Finding the right voice was hard. I really felt that the voice — like the person who opens the front door — needs to sound like they know what social innovation is about. It gives it integrity. And it needed to sound inviting." Rose remembered putting together the Hub as the most fascinating project, "It was clarifying around who we are, what we have to offer, what way we want to serve and how we want to communicate."

Working with Peter Deitz, a serial digital social entrepreneur, SiG decided on a low-cost, maximum impact site that separated the learning into distinct areas, flowing from introductory to mid-level to more advanced knowledge. We wanted to allow for seamless updating and an open archive, accessible to anyone who wanted to explore resources that didn't make it on to the public-facing platform.

The SiG Knowledge Hub launched in March 2013 to a sold-out audience at MaRS Discovery District, with Frances Westley as keynote speaker. Also unveiled at the presentation was the most successful communications asset SiG had developed to date: the now award-winning motion graphic.

In three minutes, the motion graphic explains what took the partners much longer to say in person. The script was a thoughtful and succinct blend of our definition, written by Westley, with some more popular vernacular gleaned from what worked in public presentations by the SiG partners. It maintained the complexity of social change in complex systems, with imagery that helped apply that complexity in a community setting. Online, the graphic attracted the attention of Chinese- and Spanish-speaking communities, who volunteered to translate it and share it with their communities. SiG produced it in English and French and all four versions have been viewed tens of thousands of times.

THAT "RIGHT VOICE" TURNED OUT TO BE JOANNA REYNOLDS, NOW ASSOCIATE DIRECTOR, CENTRE FOR SOCIAL IMPACT, QUEEN'S UNIVERSITY, ONTARIO

Screen capture of the motion graphic, What is Social Innovation?
(Designed by On the Chase)

To be or not to be social

"There's a mindset that maybe is partly our fault. By talking about social innovation, we marginalize ourselves," Tim Brodhead, former president of the McConnell Foundation, admitted. Social innovation is a type of innovation, but it remains overshadowed by STEM and business innovation. "Maybe it was a failure of communication on our part — we should have talked about innovation period and how you apply some of the principles of business innovation to how you address social and environmental challenges," he added.

This reflection was echoed at various times by multiple collaborators over the years. It contradicts our theory that we had to delineate the field — because naming a field gives it legitimacy and room to grow — but it remains an open question whether that was the best strategy to bolster innovation leading to transformational social and environmental impacts. It is hard not to consider that, for a decade, various submissions and policy recommendations from the SiG partners crossed the desk of ministers of innovation with little success. Does one continue to plow the field regardless or concede that grafting on to successful plants is necessary?

Preparing for the leap

"The forces of innovation today are extraordinarily powerful in the sense that they are driving towards much more of this cross-pollination, cross-fertilization between technology areas, between sectors, between actors, between the nature of the partners," Treurnicht reflected. "The reality is [however] we don't speak the same language at all. So, finding common ground and building the alignment models, there is a lot of basic work that still needs to be done."

Brodhead agreed: "Despite what you say, change is never going to be people's first choice. It usually happens because everything else has failed … we have no choice, but to change." Communications and the language we deploy helps people to take that leap. Standing on a bedrock of knowledge and wisdom, we draw strength from a shared message of what is possible to jump across the unknown toward a new, resilient normal. Communication is a catalyst and a sense-maker, helping us become wise and courageous travellers.

SiG employed multiple communications tools to do all these things. Some hit a harmonic note; others fell flat. Yet the lessons are instructive; key among them is that a team of people need not always agree on the message but, by being agile, adapting to changing conditions, and listening for feedback, in communications as in all change-making work, they can produce positive outcomes.

Communications fit for purpose

While the definition of social innovation was a critical guide in SiG's work, it was not always the most useful communications device. A systems innovation is rarely solely a communications strategy. Use communications to translate or amplify an approach. Staying grounded in an understanding of *what* you are trying to achieve will help inform language and distribution of messaging.

Know your audience

Think about what kind of communications strategy will work best for the outcomes you seek. Going big and broad in messaging produces different outcomes to longer term, deeper knowledge transfer and mobilization. One needn't be more right, but the audience will change based on your strategy.

Harness the potential of communications technologies

In the decade since SiG was born, few things have changed the world so dramatically as communications technologies. Being effective changemakers means being curious, or at least, engaging with curious and agile communications practitioners who want to test the usefulness of new technologies and help assess their potential role in your change work.

Love the questions

By Cheryl Rose, former director of programs and partnerships at SiG@Waterloo and Geraldine Cahill, manager of programs and partnerships at SiG National

Cheryl Rose

Geraldine Cahill

What is social innovation? And, by the way, what is SiG? How many times have we heard these two questions in the past 10 years? Thousands, if not tens of thousands of times! Sometimes, the questions were brimming with interest and excitement; other times they felt loaded with criticism and skepticism. In retrospect, the relentless questions were understandable; SiG was attempting to do something so brand new that we, ourselves, had to deal with uncertainties about our focus and rounds of exploration to find our direction for action. It's easy, in hindsight, to see that we were all learning as we went, individually and collectively, but at the time, there was pressure to know the answers and to communicate those clearly and compellingly to the various groups of people who looked at this initiative and asked, "What are you talking about? What are you doing? What will this mean for me and my work? How will this make any difference?"

When SiG launched it had only a few key things on which to frame itself: a particular definition, based upon research into how complex systems change happens; an ambitious mission, to create a culture of continuous social innovation in Canada; and, a symbolic image, that of drifting dandelion seeds. We learned early on that SiG's adopted definition of social innovation, from the initiative's thought leader, Frances Westley, was both gospel and millstone; it offered SiG great clarity and resonated with experienced system change agents, but it proved confusing and uninviting to too many, especially those from other sectors, who were new to this space but whose engagement was critical

to the mission. And that mission, which we saw as bold and ambitious, was interpreted by some to be bordering on arrogant. Who were we to take on creating a national culture? Then there was the dandelion image, which was based on poet Ellie Schoenfeld's "Lucien's Birthday Poem;"[120] this symbol was open to interpretation — it inspired some, but for others it represented a naive and directionless project. Which was SiG to be?

The questions and the questioning were hard to hear in the early years because we were still working to find clarity ourselves. As it always is with the beginnings of partnerships and projects, everyone was working very hard to pull everything into place. It was doubly challenging because each SiG node was deliberately situated in a different type of organizational context, with its own expectations, cultures and operational systems. It was discouraging at times to be working so hard to get initiatives up and running, while regularly having to justify the ideas and the goals.

In hindsight, there was probably too often defensive reactions, internally, to each other across SiG nodes, and, externally, to voices from our organizations and the broader field. We were human: Just a few people who all cared deeply about making a significant difference; a practical academic, a few experienced system entrepreneurs, a couple of forward-thinking philanthropists, a communications expert, and a handful of other talented staff. A ridiculously small group, but with a remarkable diversity of experiences, perspectives, skills, knowledge and networks.

This group had one more important ingredient — some long-standing friendships among those at the very centre of SiG. These relationships helped all of us to create what we came to call "SiG space" — a safe space for all the different questions: to question each other, to consider the questions of those outside the initiative, to clarify and re-clarify our goals, to debate, and explore together. There were times when this was a messy, irritating, tension-filled space. But over time, it developed to most often be a space of honesty, learning, encouragement, and strategy development.

From time to time, SiG would invite guests into this space to share their expertise with us, to test out ideas with them, and to answer their questions about our work. As written in our opening chapter, even experienced global practitioner Michael Quinn

Patton spent a day with us talking about the SiG strategy and respectfully recommended the whole thing be shut down. Too confusing, too untested, too much energy spent trying to come to consensus, too many ideas, too many opinions, too many options. He felt that the chance of maybe achieving these kinds of impacts at a national scale just wasn't worth all the effort it was taking to coordinate thought and action across the SiG nodes. His words made all of us question ourselves and this work to a much greater extent than we ever had before. It was sobering to consider whether SiG should continue to exist, given all the uncertainty and questions — about social innovation and about this thing called SiG — questions that had no easy answers.

This moment in our story may well have been one of the first times our conversation turned from trying to move forward by finding and agreeing on all the answers to the questions, to instead moving forward without all the answers. Move forward we did; none of us were willing to give up on the bold ideas of SiG and social innovation for Canada's greatest challenges. However, a new focus on action emerged, emphasizing a few strategic initiatives, believing we would learn more about the questions, about roles SiG could play, and also more about how to communicate ideas and answers, by doing the work.

All the SiG nodes renewed their efforts for action including: designing and delivering the Graduate Diploma in Social Innovation at the University of Waterloo; the Canadian Task Force on Social Finance; and social entrepreneurship education at MaRS. In all these actions, SiG principals were brought into direct contact with the growing field of practitioners and network leads across multiple sectors. We became more familiar with these actors and their contexts and we began to see that our efforts to communicate our work had to take different shapes for different audiences while maintaining the integrity of our goal to transform dysfunctional systems.

After a year or two, SiG's work was becoming more real. At the partners' quarterly meeting, an invited expert again joined us, an individual recognized for his talents in communication. He recommended messaging that he suggested would once and for all communicate what SiG was and what value social innovation offered. After a review of

our collective work, language, etc., his recommendation was to leverage the line "Canada Together" as an all-encompassing phrase that would immediately be understood and would galvanize support across the country. This didn't ring true for any of us. It was not a communication direction for SiG because it felt dishonest in terms of what was actually required to tackle system change. It was overly simple — easy to sell but not speaking to the kind of change SiG was committed to supporting.

Instead, we agreed, perhaps by default and like our actions two years earlier, to understand our path by walking it. We decided to explore how to communicate our identity, our change goals and our value by making sense of the resources we had developed and the work we, with many others, had accomplished. A huge first realization was that in our busy realities we had lost track of all that we were creating to support social innovation.

Our first job was to catalogue all the resources of each node and of various partnerships across nodes. Two of us took the lead on this and when we finally had a presentation to share with all our colleagues, it was a moment of pride to see the depth and breadth of work that we could point to and call SiG. This cataloguing effectively synthesized our collective learning as a collaborative initiative. We took time to make sense of the connection between new thinking and new action and we considered who our primary audiences were and what we had learned about how to best communicate with them. In the course of the gathering and curating of resources, an important shift happened; we moved from thinking about resources in terms of individual SiG nodes to a much more practitioner-based approach that considered which resources were most useful for what kind of new thinking or new practice to support social innovation.

This project eventually became the SiG Knowledge Hub, which continues to stand as a primary SiG communication tool. Through the creation of the hub, we found SiG, in the most real terms, through the process of sifting through our collective pieces of work and tracing the evolution of the initiative's goals. We unpacked the term, social innovation, by shining a light on what had been discovered from the interface between research around the world and practice on the ground.

Yet even with 10 years behind us, and a number of strong communication vehicles in place, we still hear those two questions: What is social innovation? What is SiG? How we've answered them has shifted over time while never losing the central message about transforming systems. Now, even how we hear those questions has changed; we rarely hear them as critical or as signs we aren't communicating well, although either of those two might still sometimes be true.

We instead hear those questions as curious and as a sign more and more people, new to this space, are joining together in wondering, in exploring, in deciding to work within our complex world for positive change. Questions, even the same ones asked over and over again, are not necessarily a bad thing. We found that you need to love all the questions when you're working and learning as part of something that has never been done before and when you are collaborating in support of the kind of change that is very complex, urgently needed but impossible to guarantee — like social innovation.

A sample of SiG knowledge assets
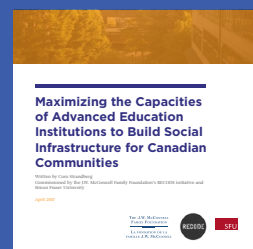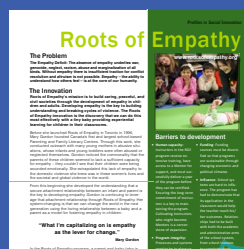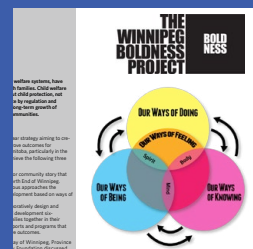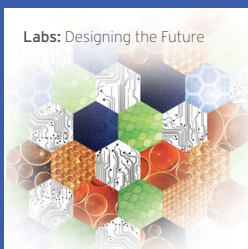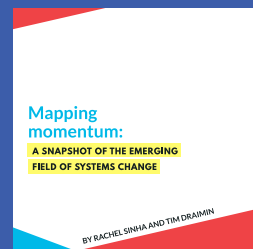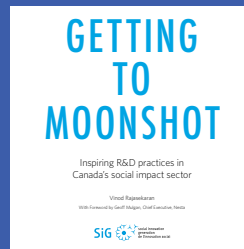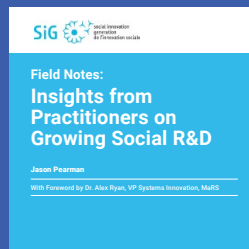
An ecosystem for systems change

After a trip to Canada in 2016, I learnt the value of investing in an ecosystem — it stimulates the seeking of genuine innovation, it grows a sector and it builds connections that could actually lead to real impacts. — Ingrid Burkett, director of learning & system innovation at The Australian Centre for Social Innovation[121]

From systems to culture to ecosystems for systems change

In October 2013, a small, passionate group of people gathered in Naramata, British Columbia to explore what community organizer Al Etmanski called the "Third Inflection Point" — the point that comes after initial success. You've changed a policy or scaled a new program, but the underlying norms and beliefs creating the problem you wish to solve stubbornly persist. Etmanski and SiG National executive director Tim Draimin liken it to the moment that you, your team or your community finally reach the summit of a mountain after climbing for years, overcoming barriers, developing new routes, navigating crevices and carrying each other. At the summit, even as your breath catches at the inspiring vista before you, you realize there is still an entire mountain range to cross. The third inflection point reminds us that, while some success at earlier inflection points is rewarding, the success of a single intervention isn't sufficient. We are reminded of this as SiG sunsets and we reflect on the past ten years and the next decade ahead. There is still much to be done.

In SiG's definition of social innovation, developed by Frances Westley, J.W. McConnell chair in social innovation at the University of Waterloo, we described social innovation as something that, over time, "changes the defining routines, resource and authority flows or beliefs of the broader social system." In other words, it is the amorphous, complex work of trying to change the norms, habits, power structures and beliefs of an organization, institution or society more broadly. That is why we described a goal of our work as systems change; we wanted to create the conditions for transformation to happen — transformation that we live and feel in our daily lives and our communities. We chose not to focus on incremental improvement, aiming for macro-level change, knowing that thousands of passionate and entrepreneurial people were working to improve outcomes for all peoples that share this land at different scales, in different ways.

Our approach to transformation was to create a "culture of continuous social innovation in Canada," an audacious goal to say the least. Our theory was that a culture of social innovation — a shared and embedded capacity and consciousness for transformation — would unleash untold innovations across sectors and the country. Through a shared mission, synergies and various combinations of partnership, SiG helped foster the conditions for social innovations to be revealed, prototyped and scaled. While our communications strategies primarily focused on discrete communities of practitioners and influencers, the net effect of SiG's activities supported a cultural shift. We didn't

FOR MORE, SEE CHAPTER 3 ON CONVENING

initiate the shift, but we heard the call and did our part to make the journey to scaling social innovations lighter, less filled with rocks. While there is still much to be done, this ecosystem, which preceded us and outlives us, is alive and well, with a diversity and dynamism we were honoured to contribute to, alongside so many others.

"Our privilege was to have the space and the money to do it differently," Allyson Hewitt, director of SiG@MaRS commented. The SiG partnership was uniquely placed to take a holistic, ecosystem approach, leveraging our distinct partner networks and the neutral broker role of SiG National. It was an approach inspired back in 2006, before the SiG partnership formally began. Following years of listening and learning from Canadian social innovators, Katharine Pearson, then director of SiG@McConnell, penned the report "Accelerating Our Impact,"[122] outlining the four best contributions the McConnell Foundation could make to see passionate changemakers succeed:

- ✳ Mobilizing and brokering relevant knowledge among researchers and practitioners;

- ✳ Convening individuals and groups with a common purpose across sectors to generate learning and collaboration;

- ✳ Developing leadership capacity for social change;

- ✳ Offering systems transformation (such as skills development, coaching, and fund diversification strategies).

While the foundation put all four strategies to work over the subsequent decade, Stephen Huddart, president and CEO of the McConnell Foundation, emphasized that the fourth recommendation was especially precient: the foundation could mobilize knowledge, convene, and build capacity, but the impact Huddart saw possible was much broader. "Truly, I think that the foundation's experience of SiG is that we continued to do those four things, but that in doing so, have discovered that [we] … are transformed in the experience," he said. The systems transformation includes the foundation itself.

The SiG experience was transformational for the partners. The insights we gained and sought to apply changed our perspectives and how we approach our work. For some, that meant diving deeper and deeper into the essence of social innovation. For others, that meant taking the frameworks and lessons that were most useful and putting them to good use under a different name. Together, however, we shared some collective insights on how to seed an ecosystem for systems change — a rich environment with ready conditions for timely social innovations to happen and scale. In particular, over time, we found there are six critical ingredients in ecosystem development, each of which we explored in this book.

Mindset

> There are no side effects — just effects. "Side effects" are not a feature of reality; they are a sign that the boundaries of our mental models are too narrow, our time horizons too short. — Dr. John Sterman, professor at MIT Sloan School of Management[123]

Systems and complexity thinking help shift how people understand the problems they want to address; they help reframe our problem definition. Through the SiG partnership, we sought to enable and support this mindset across sectors, especially through various learning programs developed at the SiG nodes or through collaborative

partnership, like the social innovation residency at the Banff Centre for Arts and Creativity, in collaboration with Suncor Energy; or Innoweave, a McConnell Foundation initiative and multilateral partnership that offers digital and in-person training and capacity-building. Putting systems and complexity thinking into practice can have a profound effect on how people work. As we embrace complexity, we change the questions we ask ourselves and others. As we uncover more of the system interconnections in play around a certain problem, we see new gaps, partners, pathways forward, opportunities to innovate, and, over time, can better focus our work on the areas of our greatest influence, knowing where others are engaged in complementary and symbiotic work toward a common goal.

Capacity-building

Various chapters have touched on capacity building events SiG hosted or supported with practitioners, policy-makers, students, advisors, strategists, designers and many more. Formal education programs represent one way to build capacity, but forums for learning and putting new craft into practice come in all shapes and sizes.

RETREATS, COMMUNITIES OF PRACTICE, CONFERENCES, WORKSHOPS...

One hard-earned insight from our experience was to start where people are — the value of learning as an action starts with honouring people in their own context and mindset. Social innovation is a commitment "to be students of reality" as Darcy Riddell, director of strategic learning at the McConnell Foundation, said.

The other was that capacity-building lives and endures in relationships, to borrow from Etmanski. Our innovation-prowess lives in relationships and the care, knowledge sharing, diversity, insight and renewal gained through bonds of trust.

Leveraging new (and different) resources

We referred to the concept of bricolage several times throughout this book. In the evaluation of the Graduate Diploma in Social Innovation at the University of Waterloo, Sam Laban, former manager of education programs at SiG@Waterloo, wrote that each year the program further developed "a coherent set of ideas about the nature and practice of social innovation, including bricolage — building alternate systems not just creating new products or programs."[124]

Banff Getting to Maybe Residency cohort 2016 (Photo courtesy of the Banff Centre for Arts and Creativity)

We learned the value of recognizing the assets already present in a system; innovation is more about recombination, bringing in what was marginalized, than introducing something completely new. As Judith Rodin, president of the Rockefeller Foundation, said, "While there is not enough money in foundation and government coffers to meet the defining tests of our time, there is enough money. It's just locked up in private investments."[125] Social finance didn't create an entirely new system: it adapted established practices such as bonds, tax incentives, and debt equity to work for the social impact community. Social finance challenges underlying cultural assumptions about profit, arguing that profit maximization is not the best way for capital to serve community; rather, organizations can symbiotically develop profit and purpose, generating shared and sustainable value.

Beyond financial resources, the insights we developed around the value of bricolage were hit further home in recent years, through our opportunity to engage with Indigenous innovators. As Senator Murray Sinclair said at the Indigenous Innovation Summit in 2015, "Innovation isn't always about creating new things. Innovation sometimes involves looking back at our old ways and bringing them forward to this new situation."[126] Bricolage is the mindset of knowing and honouring that so many of the answers we seek, exist, if only we can change our perspective and see them.

Stimulating shared strategies

Shifting an ecosystem towards innovation for systemic social change involves moving beyond transactional collaboration and towards transformational collaboration. Fostering a shared strategy throughout the ecosystem distributes risk and builds a shared sense of collective higher purpose and ambition.

As Cheryl Rose saw in the Rockefeller fellows she and her colleagues taught, "The change is more important than their own ego. It's more important than being in control." As practitioners working in the ambiguity of stuck systems, they have been running into walls, and they know they need to reach out and around the walls to find unlikely travelers to help break the barriers between them.

← ROCKEFELLER FOUNDATION GLOBAL FELLOWSHIP PROGRAM ON SOCIAL INNOVATION

Exemplary relationships will likely be those "that enable power sharing by using an asset-based approach and drawing on the tools of co-production that help create collaborative and trusting relationships that give people the risk-friendly space they need to engage and behave in different ways," Tim Draimin contends.

Partnerships are being struck across the country and across issue domain. Experimentation practices and frameworks are supporting the collaborative intention of these partnerships. We see this in the work of the various public service and social labs, and in the growing practitioner community exploring Social R&D.

We have also recognized and when asked supported the fostering of regional social innovation networks, that in many ways are striking these generative partnerships by default. B.C. Partners for Social Impact became Hubcap B.C.; we celebrate the Alberta social innovation community stepping into the foreground and Engage Nova Scotia. Overall, Canada is rated as the second-best place in the world to be a social entrepreneur by Thomson Reuters and ranked third globally in the 2016 Economist Index on Social Innovation.

Given this momentum, we will continue to push federal and provincial policy partners for greater ambition in the partnerships they strike and the risks they are willing to take. The general consensus in the change-maker community is that the world can't afford for politicians not to take risks.

Narrative

> **A good idea — whether a product, service, process or new way of thinking — does not take hold just because it happens to be a good idea. It needs to be planted in the right conditions and carefully cultivated to ensure it can take root and flourish. — Lisa Torjman, former manager of social innovation projects at MaRS**

Telling a compelling story about social innovation in Canada was an important condition for it to take root and flourish across sectors and institutions. We got some things right, developing a narrative resonant in pockets of all sectors and, frequently, across them. However, we never successfully got social innovation into the mainstream public discourse. While we attracted the attention of governments and opened policy doors, social innovation is not yet on par with STEM or business innovation in public consciousness.

This is one area ripe for experimentation and it's possible that here — on narrative — we have more allies, and more to learn, from social movements driving for systems change through civic engagement and politics. Geoff Mulgan, chief executive of Nesta, wrote at the outset of 2017 that social innovators should be awake to the politicization of people around the world: "Social innovation in many countries will need to become more, not less, political, and willing to campaign on many fronts. That means going far beyond "clicktivism", including direct action in countries where the political climate is hostile to social and civic action. It means linking individual social innovations to broader programs for change, while also tapping into the emotions that so often drive social change. Politics, and being active in democracy, is vital for social innovations to thrive."[127]

This call to social innovators ties neatly with the sixth ingredient to fostering an ecosystem: building a movement. For what is a story without people to share it?

Building a movement

> **The point about being a movement is you have to move people. You cannot move people unless you touch them. You can be a group of people who share ideas and kind of go along together but if you have a movement, you've got to move people. — Charles Leadbeater, author and thought leader on innovation and creativity[128]**

All of us involved with SiG had some version of an answer to Leadbeater's call; the principals, staff and partners believed the goal was to move people. There was not a lack of passion, nor a lack of commitment. Vickie Cammack, co-founder of the Plan Institute, saw the greatest opportunity to build a movement was in advancing the solutions we know work. "My wish for the future is that there's a real focus on helping the organizations and people with solutions to move them forward," she said. "As opposed to the creation of a whole sector of people with a certain set of expertise — academics, consultants, theoreticians. It's the solutions we want to see advance," she added. Cammack was not alone in her wish; several of the SiG principals echoed her call.

In *Impact: Six Patterns to Spread Your Social Innovation*, community organizer Al Etmanski wrote that thinking like a movement is one of those critical patterns. Guided by his change work over many decades, he wrote, "A movement is composed of a

million small acts. It's impossible to predict which one will ignite a spark or cause the next surge. And it doesn't really matter."[129]

The SiG partners could not, and did not try, to predict which act would spark the surge. Seeing a movement as composed of a million small acts fueled our ecosystem approach; we were not looking to bet on one or two acts, but trying to create conditions that would enable and support the million. But we learned, over the decade, that some bets are needed, in a matter of speaking. As Cammack articulated, with a more robust ecosystem for systems change in Canada in 2017, we are more aware than ever of the solutions that work in one context or another. The moment is ripe for focused investment in building a movement around them, carrying them forward together from "solution" to transformation."

Knowing that the road to transformation is long, but the ecosystem is alive and at work across the country, we leave the final word to Frances Westley, summarizing the spirit of her friend and vital intellectual colleague in her thoughts, Brenda Zimmerman: "I wouldn't say I'm naturally an optimist but I just tend to feel, life's too short. As Brenda would often say, life's too short and the situation is too great for pessimism. You've got to choose to do what you can. Put your energies to something that you think is worthwhile."

Brenda Zimmerman (Photo by Komal Minhas)

Epilogue

By Tim Draimin, executive director of SiG National

More than 10 years ago, the McConnell Foundation turned to partners for advice about how to grow Canada's social innovation capacities to meet the growing size and complexity of Canada's wicked social and ecological challenges and to create a culture of continuous social innovation.

Since pre-Confederation, Canada has been prodigious at generating social innovations ranging from ethnocultural pluralism and bi-national representative democracy to the Women's Institute, Greenpeace, Stop Now And Plan (SNAP), the Registered Disability Savings Plan (RDSP), Evergreen, Community Economic Development Investment Funds (CEDIF), HireUp, Math Minds, Exeko, Canopy, Integrated Conservation, Jane's Walk, Frontier College, Operation Red Nose and many others.

It turns out that communities in Canada have a propensity for generating social innovations. We are biased towards collaborative models — think historic frontier community efforts such as barn raisings, as well as cross-cultural competencies flowing from a highly diverse multicultural population. Some would say our national humility, our famed "niceness," favours both big-teaming and the enabling belief that success has many friends.

While many of Canada's innovations demonstrate significant scale of impact, too many orphaned individual social innovations struggle to move past their successful proof of concept stage and much is lost as a consequence.

This challenge, how to accelerate the successful scaled deployment of proven and powerful social innovations, was the catalyst for McConnell to co-found the SiG experiment in 2007. Building on advisers' insights, the foundation hypothesized that by stimulating a vital, multi-faceted enabling ecosystem for social innovation, new innovations could be nurtured and proven innovations would flourish, thereby improving social and ecological well-being across Canada.

Thinking ecosystem

A decade ago, "ecosystem" thinking wasn't a common philosophy or approach in the non-profit sector in Canada. The SiG partnership stories found in this book illustrate how ecosystem strengthening can remove barriers and fast-track building pathways for enabling and scaling positive social impact. Globally, philanthropic foundations have expanded their theories of change to include an integrated systems lens in their work and they increasingly seek to empower whole sectors and ecosystems.

In 2007, there were few support structures and enabling programs for social innovators. Most of the infrastructure targeted valuable new economic and leadership models adjacent to social innovation that strengthened social entrepreneurship, such as community economic development (CED), social enterprise and enterprising non-profits.

The McConnell Foundation envisaged two things for SiG:

* Firstly, that four partners working separately could empower individual innovators, passionate amateurs and institutions by creating targeted knowledge products, educational services and support platforms focused on social innovation;

(handwritten note, left margin:) LIKE THE GREAT BEAR RAINFOREST

(handwritten note, left margin:) MOSTLY IN CANADA BUT A SURPRISING— AND GROWING— NUMBER GLOBALLY

✳ Secondly, that these partners could collaborate for bigger changes, such as catalyzing a social finance capital marketplace in Canada, advocating for social-innovation-friendly policies, or building and empowering cross-sector networks.

As SiG reaches its planned sunset, two important questions surface: What are Canada's emerging ecosystem needs that future stewards should tackle? And, are there organizations, businesses and governments ready to collaboratively take up the ecosystem stewardship role?

Next ecosystem horizons: Tackling grand challenges with multi-partner innovation platforms

Building a social innovation ecosystem extends from supports for individual innovators, institutions and social ventures through to catalyzing key enabling institutions and platforms.

← LIKE SOCIAL INNOVATION LABS, ACCELERATORS & CHALLENGE FUNDS

But because individual actors are limited in the changes they can create, global pioneers are looking beyond individual actor frameworks towards building on-ramps for multi-stakeholder initiatives, tackling more complex and systemic challenges. How do we enable multi-organization, multi-sector collaborative platforms operating over the long term that target solving tough challenges without knowing the solution at the outset?

By necessity, these partnerships:

1 Engage larger and more sophisticated organizations from across all sectors;

← CORPORATIONS, GOVERNMENTS, SOCIAL SECTOR ORGANIZATIONS.

2 Leverage innovation potential produced by transdisciplinary approaches and boundary-spanning collaborations;

3 Operate on a long-term basis with reliable funding and high-risk tolerance;

4 Take advantage of robust knowledge mobilization supports;

5 Provide a functioning, effective support system that makes it easier to prototype and scale;

← LABS, FINANCIAL SUPPORT, ETC.

6 Embrace new technologies that accelerate scaling and spreading impact.

These new institutional arrangements are described in myriad ways: big teaming, generative partnerships, fourth sector, multi-stakeholder initiatives, purpose-driven networks for innovative solutions, mission-oriented innovation, collaborative innovation, innovation solution hubs, problem-solving networks, and hybrid domain collaborations.

Overcoming barriers to solution innovation platforms

Nomenclature aside, multiple barriers stifle progress to more powerful solutions platforms:

Culture is a huge obstacle: most institutions and sectors behave as silos and protect their turf;

Funding for collaborations isn't common and needs to be dramatically ramped up particularly with public sector financing;

Skills, particularly partnership brokering, are not broadly available;

Values need to be shared and clearly articulated to guide us towards aligning our institutions, resources and strategies for generating social impact and public goods.

An indispensable milestone in removing these barriers will be a mainstream innovation system that values social innovation as an integral component. Canada lacks a national integrated innovation system; social innovation is treated as a sidebar novelty rather than a driving force for innovation, aligning innovation capabilities with the social and ecological outcomes we urgently require. On the global stage, there are important prompts for integrated innovation systems, including the United Nations Sustainable Development Goals (SDGs), which provide global target setting and focus where we need innovations. Yet to intentionally link innovation with social goals, we will need to move past the operational innovation system assumption that trickle-down impact suffices.

Sustainable Development Goals (Source: sustainabledevelopment.un.org/sdgs)

The next decade: Roles and priorities going forward

Canada is better prepared in 2017 to create a multi-sector approach to integrated innovation with social innovation. The federal government is working on a new Social Innovation and Social Finance Strategy and numerous provinces and territories have social innovation strategies at work. More Canadian corporations are integrating social impact into their core business strategies, embracing the circular economy, social-purpose corporate venturing, and integrated community investing. Increasingly, social organizations recognize their ambitious goals require forming partnerships with unlikely partners and building movements. And academia is explicitly exploring how it builds new social infrastructure to support collaborative solutions to wicked challenges.

LIKE RBC AND SUNCOR ENERGY

THROUGH A NATIONAL DIALOGUE ENGAGING UNIVERSITIES ACROSS THE COUNTRY

Moving forward, here are three opportunities to build and support the social innovation ecosystem in Canada:

1 **A national network:** Throughout 2017, leaders from all sectors convened to scope out and ignite a national social innovation network in Canada. This network could act as an ecosystem steward and fast-track getting social innovation into the mainstream, by devising and supporting strategies for business, government, academic researchers and social sector organizations to co-creatively generate, deploy and scale high-impact innovations serving society. A national network could help ensure Canada builds a distributed and virtual enabling infrastructure, building on institutions and supports already in place at the local and regional levels.

2 **Public policy:** Canada would become a global leader by modernizing its innovation policy to create an integrated innovation system, aligned with its social and ecological challenges. It could also establish SDG-framed targets and resources for tackling 10 big challenges within the next decade. One catalytic new piece of infrastructure that would help pave the way is a field building publicly supported social finance capital provider.

INTEGRATING, SOCIAL, STEM & BUSINESS INNOVATION

3 **Capacity-building:** There remains a range of capacity needs for individual actors and institutions. Role-model capacity-building programs such as Innoweave, Tamarack Institute, Social R&D, and "Getting to Maybe" social innovation residency at the Banff Centre for Arts and Creativity could be replicated and greatly expanded across geographies and thematic fields.

FOR EXAMPLE: STRATEGIC FORESIGHT, SYSTEM MAPPING, PARTNERSHIP BROKERING

Canada has demonstrated its ability to unleash the innovation capabilities of passionate amateurs, community organizations, businesses, and public institutions. We are now challenged to mobilize and transform our innovation system in order to tackle our deeply rooted complex and systemic challenges. The SiG story helps illuminate that non-traditional and long-term partnerships comprising collaborative innovation, while very hard and often messy, are core attributes of the innovation formula we need to pursue. Collaboration is fundamental to the secret sauce if we want to unlock new value serving society.

Contributors

While the authors have benefitted from the specific wisdom of some and the collective wisdom of many in our generous social innovation ecosystem, they are particularly grateful to the following people for making time to speak with us for this compilation.

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and educational experiences.
Many of the anonymous
entries are included through-
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Kelsey Spitz joined the Social Innovation Generation (SiG)
National team in 2014. In her time with SiG, she co-created,
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Nancy Truman was entrepreneur editor at the *Financial Post*
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Index

Timeline

1998

» The McConnell Foundation launches the Applied Dissemination granting program

1999

» McGill-McConnell Program for National Voluntary Sector Leaders launches

2002

» McGill-McConnell Program for National Voluntary Sector Leaders closes

» McGill-DuPont Social Innovation Think Tank opens

» Applied Dissemination Peer Learning Group launches and runs until 2007.

2005

» The McConnell Foundation asks Al Etmanski & Vickie Cammack to explore social innovation program options through the Sustaining Social Innovation initiative (SSI)

2006

» Frances Westley, Brenda Zimmerman and Michael Quinn Patton publish *Getting to Maybe: How the World Is Changed*

» Tides Canada hosts early social finance field-building work, with a branded project, Causeway

» Causeway becomes the precursor for the Canadian Task Force on Social Finance convened by SiG in 2010

» The McConnell Foundation approves SiG, with five years of funding and a sunset clause

» McConnell puts out a RFP to create a social innovation centre; the University of Waterloo, under the leadership of President David Johnston, is selected

SiG is born

2007

» McConnell publishes *Accelerating Our Impact: Philanthropy, Innovation and Social Change*

» The Government of Ontario confirms $10 million in funding for SiG@MaRS

» PLAN Institute hosts SiG@PLAN

» SiG@Waterloo starts up with Frances Westley and Cheryl Rose

» Causeway and MaRS organize Canada's first Social Finance Forum, welcoming Sir Ronald Cohen of the UK Social Investment Task Force as a featured speaker

» MaRS hosts the Social Entrepreneurship Summit initiated by David Pecaut of Boston Consulting Group and the Schwab Foundation

2008 & 2009

» BC Premier Gordon Campbell meets with Al Etmanski about social innovation

» The SiG National office forms to support partnership activities and integrates the social finance work

» MaRS hosts an expanded Social Finance Forum

» SiG@MaRS hosts Social Tech for Social Change training leading to Net Change 2009–2012

» SiG National partners with Volans in London, U.K. to organize a social innovation and social finance study tour to London, inviting all the SiG nodes, plus additional potential partners

» SiG meets with federal Minister of Finance Jim Flaherty to seek his sponsorship of a Social Finance Task Force; he responds he cannot sponsor, but if SiG proceeds, he will receive the findings. SiG proceeds knowing he would receive it.

2010

» SiG convenes the Canadian Task Force on Social Finance (CTFSF), which presents its report to federal Minister of Finance Jim Flaherty in December

» MaRS announces its intention to create the MaRS Centre for Impact Investing with support from the Rockefeller Foundation, the McConnell Foundation and the Young family

2011

» The BC government announces an Advisory Council on Social Entrepreneurship (later changed to Social Innovation) with Al Etmanski as one of three co-chairs

» SiG launches Inspiring Action for Social Impact, multi-year cross-Canada thought-leaders speaking program

» Tim Brodhead steps down as president of the McConnell Foundation and becomes a Senior Fellow with SiG

» McConnell Foundation appoints Stephen Huddart as new President & CEO
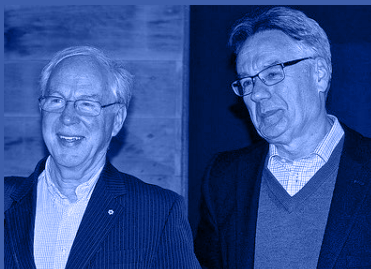
» Federal Minister of Employment and Skills Development Diane Finley appoints Al Etmanski and Tim Brodhead to an advisory council on social innovation

» Federal budget mentions the Canadian Task Force on Social Finance and assigns follow-up to Human Resources and Skills Development Canada

» McConnell Foundation decides to renew SiG for 3 years

» The University of Waterloo launches the first Graduate Diploma in Social Innovation cohort

» MaRS organizes the Ontario Social Innovation Summit hosted by three provincial ministers

» McConnell Foundation creates Innoweave

» McConnell deepens integration of social innovation into thematic programs

2012

» The BC Advisory Council on Social Innovation makes 11 recommendations to the provincial government, including the creation of the free-standing Partners for Social Impact

» The University of Waterloo launches the second Graduate Diploma in Social Innovation cohort

» The University of Waterloo and MaRS publish seminal papers on change labs and social innovation labs

» MaRS announces the creation of the MaRS Solutions Lab with support from the Evans family and other funders

» Rockefeller Foundation partners with University of Waterloo to develop a global fellowship in social innovation

» With support from the Ontario Trillium Foundation, SiG@MaRS conducts feasibility study, leading to the launch of the School for Social Entrepreneurs Ontario

» McConnell Foundation and SiG National participate in a study tour to Spain, opening relationships with UpSocial in Barcelona, and ESADE Social Innovation Institute

» McConnell develops a Social Innovation Fund as a new funding window

» The Government of Ontario renews MaRS social innovation funding for 3 years

2013

» The University of Waterloo launches the third and final Graduate Diploma in Social Innovation cohort

» The Government of Ontario funds MaRS Studio [Y], a youth social impact and systems leadership program

» The federal government funds Innoweave

» SiG nodes partner to support the Trico Charitable Foundation's hosting of the Social Enterprise World Forum

» Tamarack Institute partners with several SiG nodes to host the Third Inflection Point

» Frances Westley keynotes 1st social innovation research conference, Social Frontiers, London, U.K.

» SiG, MaRS and multiple partners co-host Volans' Breakthrough Capitalism event in Toronto

» McConnell launches the Social Innovation Learning Program (SILP)

2014

» McConnell Foundation launches Cities for People

» SiG, BC Partners for Social Impact and Social Innovation Exchange (SIX) partner to host the global SIX Summer School in Canada for the first time

» SiG teams up with numerous local partners across the country under the banner of Social Innovation Week Canada, a time-bound national alliance of events and connections

» SiG, KPMG, Volans, and MaRS launch Canada's first report on Corporate Social Innovation

» MaRS Solutions Lab hosts world-leading lab practitioners for Labs for Systems Change event

2015

» Al Etmanski publishes his book *Impact: Six Patterns to Spread Your Social Innovation*

» SiG co-hosts a Wasan Island exploration of Social R&D that ignites a dedicated focus on the field

» The ABSI Connect Fellowship launches with support from the Suncor Energy Foundation, Trico Charitable Foundation and Mount Royal University to answer the question: How can we do better at solving complex social and environmental problems in Alberta?

» WISIR with design support from MaRS Solutions Lab publish the *Social Innovation Lab Guide*

2016

» SiG hosts The Australian Centre for Social Innovation (TACSI) on a cross-country 7-city social innovation knowledge exchange and tour

» Social R&D hosts a second annual national retreat

» TACSI invites Allyson Hewitt to be South Australia's next Thinker in Residence, sponsored by the Dunstan Foundation in partnership with the government of South Australia

» ABSI expands its fellowship program and partners

» McConnell announces the LabWise training initiative

2017

» ABSI Connect Fellowship iterates again to support the social innovation ecosystem in Alberta

» SiG partners with SIX, Nesta, TACSI, UNDP and the McConnell Foundation on the SIX Wayfinder event

» SiG hosts a Social R&D roundtable for funders at SSHRC featuring Geoff Mulgan, CEO of Nesta

» McConnell and Simon Fraser University co-host 20 university presidents to discuss a new McConnell, Simon Fraser University and RECODE jointly commissioned paper on the emergence of social infrastructure at advanced education institutions

» Social R&D hosts a practice gathering for over 40 practitioners from across Canada

» SiG joins a collaborative to develop Spark! Canadian Social Innovation Exchange — a three-day national event

» Frances Westley co-authors the watershed article, "The concept of the Anthropocene as a game-changer: a new context for social innovation and transformations to sustainability"

» McConnell's Cities for People collaborates with partners Evergreen and La maison de l'innovation sociale to host an exploration of a new national network, Future Cities Canada

» Social Finance Forum celebrates its 10th anniversary

» Ministry of Employment and Social Development Canada convenes a Social Innovation and Social Finance Co-Creation Steering Group, including SiG principles Stephen Huddart and Allyson Hewitt for specific policy measures to advance social innovation and social finance

» SiG hosts a capstone event at MaRS to celebrate and close the SiG partnership and launch this legacy book

Social innovation is in Canada's nature. From the advent of medicare to peacekeeping, Blue Box recycling to Greenpeace, Canada is a country with a long history of social innovation beginning with First Nations, Inuit and Métis communities. From coast to coast to coast, passionate people driven by necessity, human ingenuity, and care innovate to collaboratively transform the very way society works and make it more inclusive, sustainable, just and well.

Social Innovation Generation (SiG) came together to serve these people and communities. A collaborative catalyzed by the McConnell Foundation, in partnership with the University of Waterloo, MaRS and the Plan Institute, our collective mission was to foster a culture of continuous social innovation in Canada. For us, this meant understanding and nurturing the conditions across sectors and across the country for social innovations to scale, endure, and have impact. Imagine how social innovation, combined with mainstream innovation, could solve Canada's toughest intractable social and environmental challenges.

In this book, we lay bare what our mission meant to us, why it mattered, what we learned, where we stumbled and our insights into how social innovation happens. This is our way of paying forward our insights, cultivated in collaboration with dozens of generous partners over the years.

As a partnership, we collectively sought to exemplify our logo — the dandelion — helping to seed and nurture the field of social innovation. Sharing our decade-long journey is our final step. With a final deep breath, we blow the remaining seeds as far afield as possible to nurture the landscape supporting social innovators across the country.

www.thesigstory.ca