GETTING TO MOONSHOT

Inspiring R&D practices in Canada's social impact sector

Vinod Rajasekaran

With Foreword by Geoff Mulgan, Chief Executive, Nesta

SiG social innovation generation de l'innovation social

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FOREWORD

GEOFF MULGAN

Geoff Mulgan is the Chief Executive of Nesta, the United Kingdom's innovation foundation whose mission is to help people and organizations bring great ideas to life.

Necessity can be the mother of invention. It's certainly true that really hard questions can prompt really creative responses. SiG's new report, 'Getting to Moonshot: Inspiring R&D practices in Canada's social impact sector' is a great collection of case studies demonstrating what this means in practice. It showcases 14 Canadian not-for-profit, charitable and social enterprise organizations engaged in research and development (R&D) activities that better deliver products and services that change lives.

Canada faces many of the big challenges that other developed countries do – from energy transition and economic inequality to finding jobs in rural areas – as well as some that are more unique, like reconciliation with indigenous peoples. Like many other countries, Canada invests a lot of money in traditional R&D and business innovation. But it's now addressing how to shift more money, and brainpower, to social as well as economic needs.

In this report, you'll find fascinating accounts of what this looks like in action. The mission to the moon in the 1960s serves as a good metaphor. It combined what seemed an almost impossible goal with a programme of innovation driven by an agency with a strong public mission, collaboration on a vast scale, and, of course, success against the odds. It was also the biggest and boldest expression of the mid-20th century idea of R&D.

In 'Getting to Moonshot,' we see that boldness applied to social challenges. Some aspects of the Social R&D method are very like other kinds of R&D, including the use of experiments and evidence. Other aspects are very different: many of the projects are small and more iterative and often involve beneficiaries in the R&D process (not something rocket scientists had to worry about).

The social sector has some way to go in making R&D mainstream and in providing as strong a pull to spread and scale new ideas as the push that goes into creating them in the first place. But this is an inspiring start. If our societies are to thrive in this century, and achieve the Sustainable Development Goals that the world has signed up for, we'll need a lot more of the spirit, and method, that's so well documented here.

PREFACE

I will never forget the moment.

My daughter, who watched it with me, probably will. But not to worry, I feel that these moments will become commonplace for her generation. The moment I'm talking about is the first successful landing of the SpaceX Falcon-9 rocket on a droneship.

Inspiring and exhilarating. As a trained aerospace engineer, I can tell you that this was quite a feat. A brilliant show of technical audacity. But perhaps more importantly, the landing did something else - it validated a hypothesis for a team after years of work. The successful landing opens up endless possibilities for space exploration - but it didn't work on the first try. My daughter didn't just witness success. She (and I) watched the many screw ups, aborted launches and failed landings prior to that exhilarating success. In her own way, she witnessed what we call R&D: research, untested ideas, new practices, risks, prototypes, failures and experiments.

As exciting as the landing was, I wrestle with the uncomfortable fact that we are yet to be as methodical, audacious, and cheery about R&D for solving social problems. Challenges like children not feeling like they belong in their own communities, or not having access to clean drinking water or quality recreation experiences. My daughter was born on March 8 - International Women's Day. Before reaching the age of two, she has already experienced freedoms and opportunities that millions of girls will not - opportunities in play, in recreation, and learning. I hope that as she grows older, she won't have to ask me why we cheered on and were inspired by and supportive of R&D for space exploration, but not for solving social problems.

In business, organizations that continuously develop new ideas, products and practices have greater impact in the marketplace - SpaceX is proof of that. It is unacceptable to me that the field of social problem-solving has yet to coalesce around a shared body of knowledge, a practice, a mindset, or the support infrastructure, resources and incentives to comprehensively and consistently pursue R&D.

Now is the time.
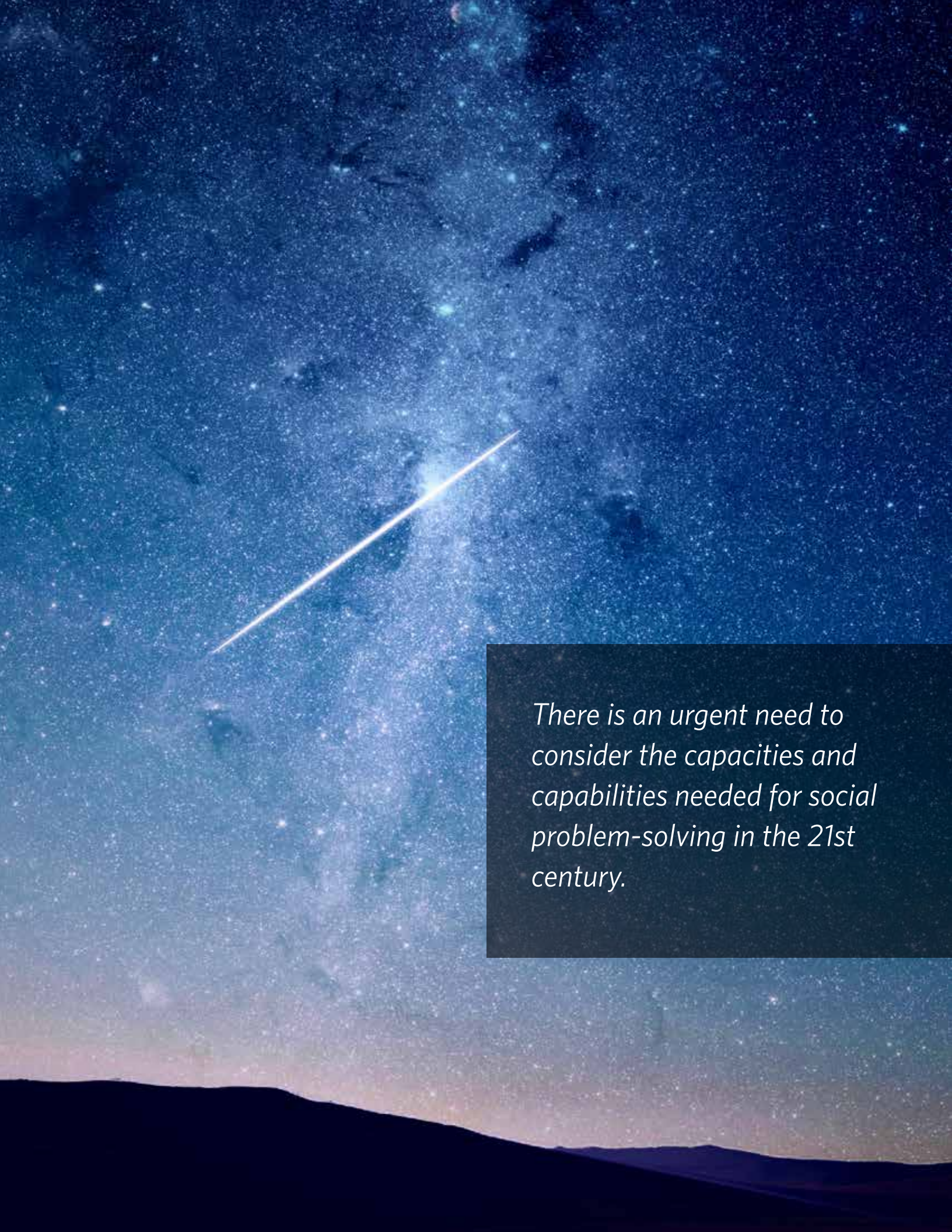
A better future demands legitimizing and supporting R&D in pursuit of advancements in wellbeing. In additional to being technologically audacious, we must figure out how R&D can also drive Canada to take more audacious action for social impact.

We can then truly say, that for the 21st century, R&D is legitimate, embedded, and mainstream as a craft in our field of work. Let's update the social problem-solver's playbook.

This is our moonshot.

Vinod Rajasekaran

There is an urgent need to consider the capacities and capabilities needed for social problem-solving in the 21st century.

WHY THIS MATTERS

Societal challenges are complex, borderless and dynamic.

Canada has an unsustainable social outcomes spend.

People are not accessing the best possible social services, supports and solutions.

Canada faces increasingly complex social, ecological and economic challenges. Against this backdrop, it's an uncomfortable fact that Canada's social outcomes spend - 7% of GDP according to the OECD or roughly $300 billion - is not yet producing better, more lasting impact.

Solutions are not developing at the same pace as problems. In this context, there is an urgent need to critically consider the capacities and capabilities needed for social problem-solving in the 21st century to make measurable advancements against societal challenges.

Over many decades, Canada's social impact sector has built strong capacities, capabilities and standards in volunteer management, governance, financial reporting, program delivery and fundraising, among other things. In addition to these, there is increasing consensus that problem-solving in the 21st century requires additional capacity and ability in research and development, or R&D.

It is understood in the business world that R&D drives new, and enhancements to existing products, services and processes. It is vital to long-term competitiveness. Businesses that conduct R&D have greater impact in the marketplace. R&D can also help social mission organizations achieve significant advancements in long-term quality of life for Canadians. However, R&D is not yet well-understood or widely practiced and thus is not yet legitimized as a core organizational practice. In fact, according to recent research by the TCC Group, only 5% of the nearly 2,500 social mission organizations studied are engaging in R&D practices. The study also discovered that organizations that use R&D practices are almost two and a half times more likely to grow at or above the annual rate of inflation, regardless of the size of the organization's budget.[1]

Now is the time to build a body of knowledge, practice, resources, and standards around social R&D. The goal of the social R&D exploration incubated by SiG is to catalyze just that. By working with funders, policymakers and practitioners to establish proof points and build a community of practice over the long-term, the exploration aims to boost the legitimacy and value of front-line R&D, thereby finding ways to strengthen adoption, legitimacy,

capacity, capability and resources. This report is an initial, but critical step in this direction.

So, what is Social R&D?

With crowd-sourced input and feedback, the working definition is:

A combination of competency, culture, and craft that is intentionally applied to continuously learn, evaluate, refine and conduct practical experiments in order to enhance social wellbeing.

Although not yet mainstream, there are sparks right across Canada. While this report presents profiles of inspiring R&D practices, the following examples give you a taste of what to expect.

The social enterprise **InWithForward** conducted R&D into how adults with cognitive disabilities learn, leading to the implementation of an innovative start-up in Vancouver called **Kudoz**, an adult learning exchange hosting hundreds of lifelong learning experiences. The result: a more inclusive, stronger community.

Framework, a charity that created and runs Timeraiser, prototyped and developed a number of innovations over the past ten years to advance volunteerism, which has led to more than 170,000 volunteer hours performed by young professionals across Canada. Their work has fueled a greater sense of belonging for the young volunteers involved, while also helping charities achieve their social mission.

Youth Fusion in Montreal is seeing success in lowering high-school dropout rates across Quebec by involving more than 20,000 youth-at-risk in meaningful school projects that foster learning, skills and social integration — a practice supported by experimentation and finding new formulas.

The compelling approaches above demonstrate how R&D is accelerating the closing of gaps in youth employment, inclusive lifelong learning, and volunteerism.

This report presents close to 70 inspiring R&D practices from across Canada. It is an initial collection that offers visibility into R&D models, R&D language, how capacities are built, how organizations incentivize and integrate R&D, how organizational culture for R&D is fostered, how R&D knowledge is generated and shared, and how R&D is resourced within organizations.

This exploration assumes that there must be social mission organizations across Canada pursuing R&D. Therefore, as the report focuses on inspiring accounts of the positive, 'appreciative inquiry' as a methodology to present findings was a natural fit. Appreciative inquiry is a process that inquires into, identifies and further develops the best of what is in order to create a better future. From the close to 150 individuals and organizations engaged in SiG's Social R&D journey so far, as well as those not yet actively involved, 15 organizations were identified and invited to participate in this exercise. A detailed description of the appreciative inquiry methodology is included in the Appendix.

There are great elements of R&D in Canada's social impact sector and this report is an attempt to make a small portion of them visible to demonstrate that investment in experimentation and R&D is a critical success factor in seeing measurable gains in social wellbeing.

The practices in this report are prompts for funders, philanthropists, front-line professionals, entrepreneurs, intrapreneurs, R&D practitioners, nonprofit executives, policymakers, academics and elected officials to fuel the sense of urgency and embrace an action bias toward boosting the legitimacy, adoption and funding of R&D.

By presenting a handful of the current "best of what is," together we can envision and create a future of what it might be like if "the best of what is" occurred more frequently, in a systematic way across the country.

WHAT THIS IS NOT

A MANUAL OR FIELD GUIDE
This is not intended to be a how-to manual or field guide for experimentation processes, change management, R&D adoption or strengthening culture within an organization. What is highlighted are some of the key ingredients. You could improve your existing recipe by removing, adding or tweaking ingredients through exchange with other R&D practitioners, or better yet, learn by doing.

A COMPLETE PICTURE OF BEST PRACTICES
This is not an A to Z of R&D practices. Neither is it a complete picture of the variety and breadth of R&D models. It is a glimpse - a taster if you will - of how embedded R&D practices are making a significant difference in how organizations pursue and achieve social impact.

CONTEXT INDEPENDENT
Each of the inspiring habits and overall patterns are not to be taken out of context. From the reader's vantage point, it might 'take a lifetime' in your context or you might find yourself saying, "been there, done that." Learn by doing is one of the common threads across the organizations; therefore, what they are practicing today might not be what they do tomorrow.
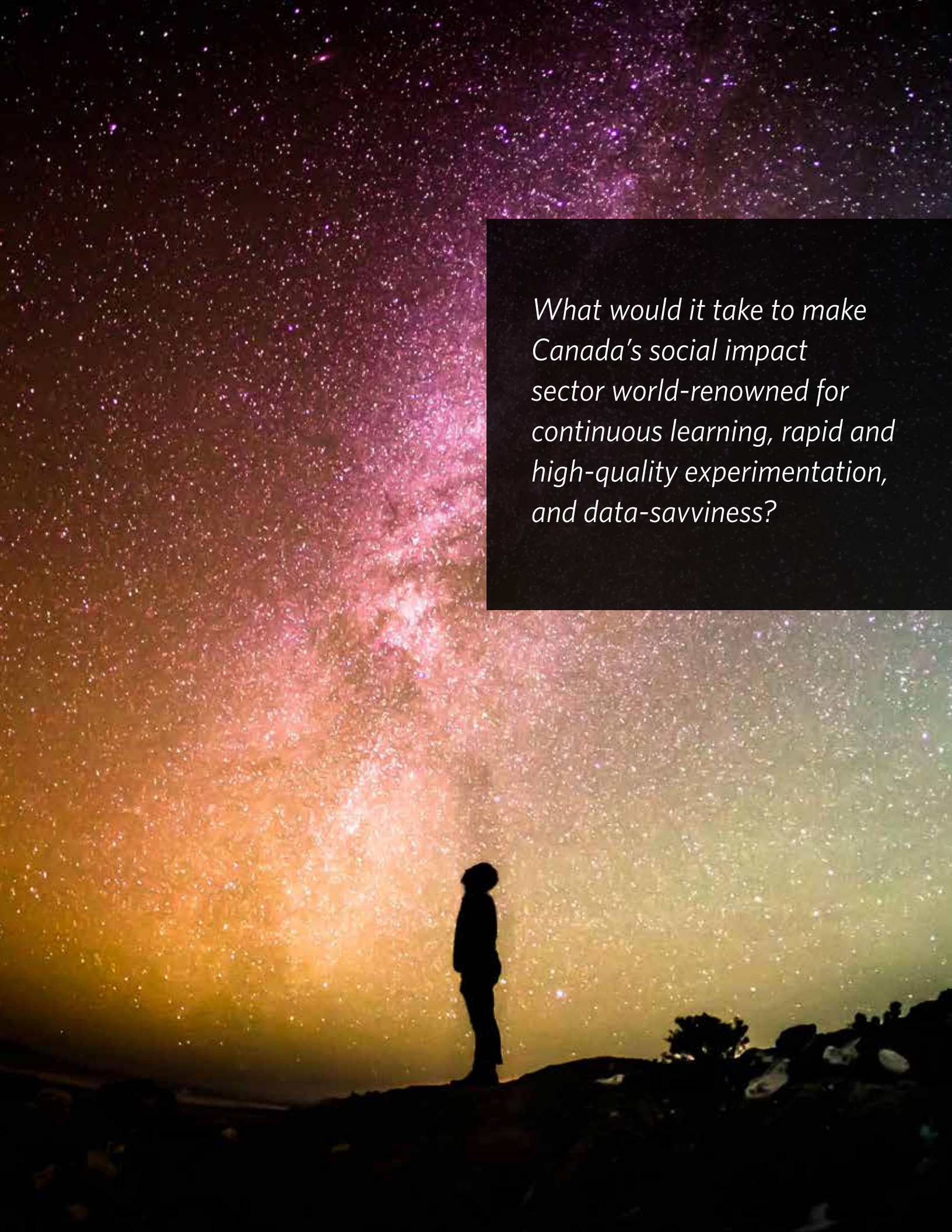
A STATIC REPOSITORY
This is not designed to be static. As much as it looks and feels like a report, it is the beginning. The next iteration might be moving this content online and having it be searchable, dynamic and open - a Social R&D wiki that is an open source project with practitioners as the contributors.

A SILVER BULLET
While these are inspiring practices from across the country and a variety of issue areas, no one practice or intervention can single handedly solve a complex social problem. R&D is not the silver bullet nor is there one model that is universally superior. Instead, it is increasingly seen as one of the critical pieces of the solutions puzzle for the 21st century.

What would it take to make Canada's social impact sector world-renowned for continuous learning, rapid and high-quality experimentation, and data-savviness?

SOCIAL R&D

Social R&D is sort of like uncharted territory in our galaxy. Some have seen sparks of action from a distance. It is a new field with a small body of codified knowledge and practice. Although largely uncharted, R&D has tremendous potential for how social impact happens in the future. And there is a fast-growing crew keen to collectively explore this new territory - to boldly build a body of knowledge, share their craft, create common standards, and strengthen resourcing and capacity, in order to have a 21st century R&D system that advances the wellbeing of people and planet.

R&D activities come in a number of guises and can unleash continuous process, product, policy, front-line, organizational, relational and systems innovation. R&D matters for lasting social impact but the practice is not adopted systematically across the social impact sector - yet. Now is the time to kick start this. Reinvention and one-offs yield costly results. Short and inflexible funding cycles have rewarded plan-based approaches rather than hypothesis-testing approaches.

Lack of capacity and social permission to conduct public experiments has led society down a path where the most vulnerable cannot access the best possible services and solutions.

20th century R&D was largely capital intensive, insular, incremental and rigid. Access to knowledge was controlled. It was bound by a single sector or industry, centrally run, lacked flexibility, and patents were a core success metric. There are deeply held, unstated and unquestioned assumptions about how things are done that have become orthodoxy over time. In many ways, the 20th century R&D approach is laggard and, as a result, is evolving and transforming in corporate and academic settings.

The appreciative inquiry process behind this report helps to uncover attributes of a new, high-speed, practical R&D approach fit for 21st century social problem solving. It is encouraging to see Canadian social mission organizations demonstrate attributes of a new system that can embrace what innovation guru Navi Radjou calls the five major components of complexity: scarcity, diversity, interconnectivity, velocity, and globalization. These organizations aim for applicable learning in day or weeks, as well as in months or years.

There is a golden opportunity to leapfrog the classic industrial R&D model and seed a Social R&D ecosystem that reflects the way of working, learning, sharing and the connectivity of the future.

The MATCH International Women's Fund's award-winning campaign

Regeneration Community Services' Pathways to Recovery Group

A NOTE ON LANGUAGE

The language and typologies of innovation have evolved over the last 50 years, most significantly through industrial R&D. The term "R&D" was made mainstream in 1947 by the US President's Scientific Research Board. The OECD definition of R&D is more inclusive, framing it as "comprising of creative and systematic work undertaken in order to increase the stock of knowledge - including knowledge of humankind, culture and society - and to devise new applications of that available knowledge."[2]

Much of the language in the social impact sector borrows from academic, scientific and technology sectors. This exploration has revealed multiple ways of knowing and a spectrum of language, from the robustness and rigour of academic research to colloquial terms that do not carry much weight in a front-line context including *hack*, *causal analysis*, *stress test* and *logic model.* Then there are terms such as *bootstrapping* that mean one thing in the technology R&D world and another in the social sciences research methods world. Or terms that are used interchangeably such as *capacity* and *capability.* There are words such as *innovation* that are perhaps overused and/or used too early in a process. It is important to note that there are no standards or widely accepted definitions of most innovation or R&D terms in Canada. The term R&D itself has a variety of formal and informal meanings in multiple contexts, cultures and geographies.

Recognizing that there is no standard definition in Canada but that there is value in making typologies visible and attempting to create shared language, the following principles are applied throughout this report:

The language used and presented is unique to each organization's R&D practice. It was a deliberate choice to not standardize. We chose to preserve words and terms, as it allows for diversity and opportunity for everybody to gain contextual insights and potentially new language.

There are multiple ways of knowing. Industrial R&D is largely built on scientific epistemology, which looks to logic, empirical definitions, observations - more of a singular way of knowing. In social sciences, contextual epistemology is more useful, allowing for multiple and more contextual ways of knowing.

Language constantly evolves, some at faster rates than others. It is important to be aware of the evolutionary and transient state of terms and definitions. What might be "in" today may not be "in" tomorrow.

Finally, it is important to use approaches such as analogies, personal reference points and bridging terms to create shared language that brings everybody along.

INSPIRING PRACTICES

The practices within this initial collection cluster around three levers: capacity, culture and connectivity.

Each organization has unique origins and is rooted in different hypotheses and starting points. Together however, these levers constitute core ingredients for facilitating, sharing and scaling R&D.

The practices highlight stories of enlightenment, struggle, risk and course-corrections. A number of organizations have had to fight discriminating views of R&D and experimentation by some funders and donors, and as such, a majority of these practices have never been openly shared until now.

Their boldness, persistence and willingness to share is an inspiration to us all.

CAPACITY

Social mission organizations create, cultivate and fund R&D capacity within their teams in a variety of ways. Capacity is characterized as *intentional space* and *enabling context* for reflecting, voicing, reframing, and building know-how. It includes space to embed new ways of doing and better understand permission, pace and feedback. As well, it is space to absorb new skills in research, prototyping, experimentation, data science, stakeholder engagement, and storytelling, among others. Growing R&D capacity involves shifting organizational structures, learning patterns, governance and internal incentives.

BE LEARNING GREEDY

Professional development and new hire on-boarding is one avenue for creating space to strengthen R&D capacity.

Learning and development empowers staff at every level to embrace innovation as core to their work, hold ambiguity, better understand risk, and be open to experimentation.

At **Saint Elizabeth**, an award-winning home and healthcare provider, innovation education is incorporated into leadership development programs for new, senior and young leaders, emphasizing that iterative innovation is part of their core function. Job descriptions are refined based on what strengths are discovered. Leaders are invited to participate in external programs as mentors, promoting cross-pollination with new ventures and entrepreneurs at incubators. Baking innovation education into new employee training ensures that individuals at all levels of the organization are given the tools to conduct experiments well.

Open North, Canada's leading not-for-profit specializing in open data and civic technology, recently integrated innovation into a revised training module for new hires, connecting the development and program delivery sides of their organization. This has allowed Open North to create space for individuals on both development and intervention sides to set the pace, learn together and design new experiments together.

Skills Society, an Edmonton-based organization that supports the citizenship of people with disabilities, focuses on innovation learning tools for staff through their Citizen Action Lab. They believe that all innovations have a shelf life and if they get too attached to sustaining one innovation that was successful in the past, they will be unable to see opportunities and produce relevant solutions for the community they serve. Further powering staff innovation capacity is the Action Lab - a social enterprise and a physical space to think differently and make ideas happen. Intentional learning space through the Action Lab supports the refinement of problem solving processes like their Citizen Action Lab process - which they have been researching, developing and tweaking over the last 10 years - and the creation of sense making and problem solving tools, new use cases, updates to existing projects, among other things.

The MATCH International Women's Fund practices three *do something* and three *do nothing days* per year. *Do something* days are about digging deep into The MATCH Funds' learning and experimenting and asking tough questions. Subject matter and learning objectives for do something days are crowdsourced within the team. *Do nothing* days focus on putting team members in new spaces to bring out other sides of individual and collective character. These are important rituals for building R&D capacity and understanding the whole ecosystem within which each team member operates. It also helps to deepen understanding, belonging, friendship and compassion between individuals.

PLAY THE SIMULATION GAME

Conducting simulations strengthens R&D capacity. Simulations have long been a way to prepare in the military. They offer dedicated time away from delivery and help teams focus on development. Simulations offer space to better understand team dynamics, environmental realities, change management, and risk.

In 2007, the **Canadian Red Cross** was involved in developing a field-based simulation model focusing on humanitarian response training in disasters. It is an immersive experience that has a focus on learning by doing in the field. These *Field Schools* allow for opportunities to simulate a disaster or crisis in a community-based setting before they are deployed in the field.

At **Open North**, staff host online simulation experiences that enable organizations and their stakeholders to become more integrated in decision making. Their simulation experience platforms such as Citizen Budget and Ready Reckoner are examples. Open North creates these spaces to continuously test assumptions, engage audiences, and accelerate their learning. They understand that there will always be more ideas outside the organization than there will ever be inside.

GrantBook, an organization that specializes in digital strategies for grantmakers, also pursues R&D through simulations. They have formalized design-sprints and have a simulation platform, the XYZ Foundation. They have created nearly 20 archetypes of different personas involved in philanthropy in order to simulate workflows, accountabilities, new job descriptions, actions and reactions in order to identify and mitigate issues with efficiency and compatibility.

RELATIONSHIPS, NOT HIERARCHY

Decentralized innovation as a way to strengthen R&D capacity is seen across a number of organizations working with demographics who have traditionally been marginalized voices in society. The idea here is that valuable insights can come from anywhere in the organization and have the ability to boost everyone.

At **Youth Fusion**, a youth-serving organization, management does not lead R&D and, instead, learns from the employees. Capacity is strengthened by spaces created from the bottom up. Employees lead learning, storytelling, feedback and capacity building. The management team easily follows and in doing so, empowers the organization to lead.

New Dawn, a social enterprise focused on community building and the oldest Community Development Corporation in Canada, demonstrates an organization-wide passion and capacity for R&D that is probably best characterized by a loose affinity for servant-leadership – or the notion that those in more senior or leadership positions should seek to serve, enable, and support those who report to them. Often this means defining parameters or expectations but then allowing for and encouraging as much autonomy as possible in R&D execution. It seems that when staff feel ownership and are given space to reflect, question and act, they are more comfortable developing new ideas and new risk-taking ventures in pursuit of outcomes.

UNDERSTAND THE CONTEXT

Empathy-based capacity-building approaches are used in a number of organizations working with people that have struggled to be heard in society. There is evidence to indicate that empathy-based training boosts capacity for 'lived experience,' an integral component to doing R&D well.

At **Regeneration Community Services**, a community-based housing and support services organization, grassroots R&D led to building capacity around their successful Step Up initiative which offers subsidized independent housing units with on-site support services to clients living in high-support housing. Step Up is based on lived experience and on what individuals need to successfully and smoothly progress in their recovery. As a result, they have members who now work supporting others in the building through meal preparation, attendance at events and the development of new programming. The real value is seen through the personal stories of enhanced life experience. Recidivism for participants in the Step Up program is negligible.

Pursuing R&D at **New Dawn** is highly relational – it comes about as a result of many conversations with different actors outside of New Dawn. At New Dawn it is not uncommon to hear "Who can we talk to about this?" Innovations come largely from creating intentional space to observe, listen to clients and spend time in *their* setting.

GrantBook takes a very user-centric approach to R&D. They begin by looking for common pain points people in the philanthropic sector are experiencing. They then shadow staff directly and observe their frustrations and habits to craft a deep contextual understanding of user needs and desires.

New Dawn's Centre for Social Innovation

CULTURE

A healthy, rich R&D culture is all the written and unwritten, formal and informal practices, behaviours, mindsets, visual and verbal language, traditions, and social capital that are shared among a group of people in how they approach opportunities and challenges. The social mission organizations involved in this exploration demonstrated qualities of: intuition, embracing ambiguity and risk, open-mindedness, empathy, critical thinking, learning, bottom-up empowerment, and embracing complexity. More importantly, a rich R&D culture values the lessons learned when an empowered individual or group is bold enough to attempt something that hasn't been done before. Many note the importance of *dynamism* to their R&D culture, seeing culture not as something static, but as always evolving. Organizations also note the subtle lynchpin of inspirational leadership that allows employees "to follow their hearts more than their brains." There are a range of inspiring practices around creating and fostering a culture of R&D.

INSIGHT THAT CAN'T BE TAUGHT

In order to connect with users and generate insight, a number of organizations have incorporated regular immersive field visits as a critical part of their R&D culture-building. Field visits allow organizations to observe, learn, and have direct interactions with the users in their communities and foster an open, trusting and responsive relationships. They allow organizations to: reframe challenges as opportunities, make constraints work for the mission, surface values tensions, and allow for improvisation.

At **Saint Elizabeth**, more than 100 staff members, including those working in operational areas such as Finance, HR and IT, regularly go out on client home visits with some of the 8,000 front-line staff. This gives staff across the organization opportunities to better understand what happens at the front-line, how new things could be tested, what must be fed back, and what to change. On the surface, it may not seem critical to have corporate functions, such as IT, conduct field visits, but it is this activity that was instrumental to Saint Elizabeth becoming the first healthcare organization in Canada to adopt SoapBox, a SaaS platform that spurs innovation from front-line staff.

The **Kudoz** Team is made-up of secondees from service provider agencies. Over the course of developing a new service model, team members shadow front-line staff and middle managers to try to understand their realities, and find way to address their pain points.

At **The MATCH International Women's Fund**, staff, donors and board members build in field visits to connect with, learn from, and listen to partners. This is seen as an essential component of R&D culture at The MATCH Fund. The team is hosted by partner organizations in their communities. Few grantmakers conduct field visits to learn, understand context, and shadow to see struggles first hand. For The MATCH Fund, this experience is an important way to continuously innovate their grantmaking process and build the "trust metric," while exposing staff to the risks taken by their grantees everyday in the field. These insights led to the rapid-response grant-making instrument which puts money in the hands of grantee partners within days to best respond to moments of creative breakthrough or political/social momentum.

DIVERSE VOICES TO UNLIKELY ALLIES

Classic R&D is in many ways akin to an echo chamber. Mostly similar voices, with predictable perspectives, validating one another. Unfortunately, classic R&D tools and techniques used were not conceived to dynamically engage diverse users. When innovating for better social outcomes, echo chamber effects can be dangerous. Social mission organizations have recognized that diversity of voice is vital to a rich R&D culture.

The **Winnipeg Boldness Project** understands the value in having diverse groups come together to design solutions for children in Winnipeg's North End. Their Executive Director noted, "We are looking for voices that have never had the chance to be at the table. These are the voices that will help to move the yardstick forward." By grounding themselves in the community and ensuring that solutions are driven by residents, the project has been able to draw from a vast well of community wisdom that allows for significant exploration into systemic issues surrounding the neighbourhood. This wisdom and value system fuels their organizational practice and culture around asking good questions, which is integral to their research.

The Winnipeg Boldness Project

Kudoz is the result of an ongoing R&D process. The product is a catalogue of learning experiences, hosted by community members, for adults with a cognitive disability. Kudoz breaks down hierarchal structures in favour of prototyping with all voices, including users, who have a say in the creation of the final catalogue prototype. This practice allows Kudoz to not operate in an isolated lab environment but immersed in the world of their users and thus empathize with them.

HIGH-FREQUENCY FEEDBACK LOOPS

High-speed experiments require feedback mechanisms that empower front-line employees to address opportunities and challenges by improvising and sharing approaches that work. In order to continuously analyze, refine, and respond, social mission organizations are incorporating feedback loops that push information to the organization from users whenever relevant feedback is available. Such high-frequency feedback mechanisms help to nurture a more robust R&D culture.

The MATCH International Women's Fund has a cross-team buddy system in place to ensure the team members are growing mindsets, driving innovation and colliding at

the margins everyday. "Outside the box" challenges are constant and exist on MATCH's online platform for all staff to participate. As an example, they are conducting rapid cross-team research into teaching a group of 10 year-old girls about system change. The MATCH Fund often runs A/B experiments, especially in its fundraising and communications products, and then swiftly evolves content based on early data sets.

At **Saint Elizabeth**, new ideas for R&D are generated and captured through a SaaS online and mobile innovation platform. Innovation capacity within the organization is further strengthened by information at their fingertips - from e-learning to remote patient monitoring and online communities.

As part of their continuous innovation cycle, **WellAhead**, a philanthropic initiative of the J.W. McConnell Family Foundation that aims to improve child and youth mental health by integrating wellbeing into school communities, embraces a developmental evaluation whereby plans and directions are iteratively informed by feedback from partners and stakeholders, including: teachers, students, parents, community partners, principals and district staff.

THE ART OF ASKING STUPID QUESTIONS

The R&D culture in a number of social mission organizations includes dedicated time for questioning, research, learning, and generating new hypotheses, experiments, and practices to test. Since dedicated time is baked into the organizational fabric, and everybody participates, it is a unique opportunity to play and unlock imagination and creativity. There is a plethora of evidence to demonstrate the value of unstructured exploration, most notably, by LEGO. LEGO notes that dedicated play improves group problem solving by utilizing visual, auditory and kinesthetic skills.

At **The MATCH International Women's Fund**, all staff are given the opportunity to experiment, pivot, fail and learn. All staff pursue self-determined passion projects for up to 15% of their time. Examples of passion projects include: developing a story arc for the organization, gamifying a donor experience, developing a security protocol for activists at risk or strengthening internal systems to better align with mission critical work.

Kudoz is just one example of what R&D at the front-lines produces. Alongside Kudoz, 27 staff - at all levels of the partner agencies - were given 20% of their time to prototype new service delivery models. Six other solutions emerged - including a new employment co-op and a new friendship matching platform. Going forward, the partner agencies are committed to creating a permanent space for staff to co-design and prototype so that innovation isn't a one-time project, but a core function of their organizations.

A big part of **Skills Society**'s R&D culture is encouraging staff, especially those who have been around a long time, to question assumptions. They recognize it's tricky to explore assumptions but, if left unchecked, assumptions keep organizations from innovating. At Skills Society, they frequently steward explorations to wonder together. They wonder about things such as: Are we designing solutions that have real value for people's lives? Have we developed the service with the people that will use it? What are we not noticing or paying attention to?

CARRYING THE TORCH

Nurturing R&D culture takes energy, courage and inspirational leadership, especially for social mission organizations that operate under tight constraints. Leaders cannot build innovation-savvy organizations without innovation-savvy people. Sustaining passion requires, as Big Bazaar's Kishore Biyani states, a "chief belief officer"who can evangelize and fire up employees' confidence in R&D.[3]

While everyone can provide input into ideas, **GrantBook** has formalized one project manager as the de facto 'Scrum Master.' The scrum master curates the team's R&D projects, including pre-prototype concepts and brainstorming, some of which may draw on examples from other industries.

Kudoz

Skills Society's CommuniTEA Infusion experiment

Kudoz pushes the boundaries for many partners, who have different appetites for risk. To sustain a focus on bottom-up emergence, there is a 'Culture Keeper' role on the team. This individual has an extremely high EQ and has become a critical part of the team.

At **Saint Elizabeth**, R&D is actively incorporated into the strategic planning process and cascaded throughout the organization. Executive leadership is provided by the CEO and supported by a dedicated innovation cluster and champions throughout the organization.

Stewardship of R&D at **Skills Society** is guided by a dedicated senior leader of research and social innovation. However, leadership of R&D comes from across the organization, as well as from outside it. As an example, people with disabilities are the key leaders of Skills Society's CommuniTEA Infusion experiment, a mobile tea house that travels to neighbourhoods around Edmonton creating a "pop-up" town square to build and strengthen social capital.

DEFAULT TO OPEN

Virtual and physical spaces are a manifestation of organizational R&D culture. Open, fluid, functional and collaborative online and offline spaces, pioneered by the startup and coworking movement, are also embraced by social mission organizations with an aim to drive innovation through collaboration.

From a cultural standpoint, 'default to open' allows for more free flowing ideas, unlikely exchanges, and flattening of hierarchical structures.

Saint Elizabeth features a 2,000 sq.ft. open innovation space that is open to the public and the team. The space showcases their unique innovation history, staff stories, and innovation milestones. It is also an interaction and lab space where rapid prototyping and ideation can occur. This hybrid public/private space allows team members to better sense public take up as they showcase new innovations in home and health care.

Skills Society runs Action Lab, a staff and community space for convening, learning, sharing and co-creating. The Action Lab experience promotes creative problem solving, offers tools to help tap into collective wisdom and helps people prototype solutions to challenges they are working on.

On the virtual side, innovative 'everyday practices' were shared openly in year 1 on **WellAhead**'s ideas platform. Participating districts have the opportunity to comment and share through this platform. Innovations and experiments are also tracked through active research led by local teams and supported by the Knowledge Manager and developmental evaluation. WellAhead is committed to openly sharing key learnings and tools and has transparency as a core value.

CONNECTIVITY

In a fast-paced, dynamic and digital world, isolated and protected R&D practices are no longer winning. Social mission organizations are making connectivity the lynchpin of their R&D strategies. There have been volumes written on the value of access, openness, and sharing data, insight, knowledge, know-how, and perspectives digitally, as well as in-person. Organizations that have information, knowledge and practice silos will no longer be able to thrive in a world that leads through sharing. Social missions are necessarily a multi-player sport and connectivity is essential for effective R&D. The practices below demonstrate how social mission organizations are sharing, listening, and collaborating in real-time.

GET VULNERABLE

Victor Hwang famously said, "failure is merely a hypothesis that has been tested and shown to be false."[4] Openly sharing and discussing failure is just as important for R&D as is celebrating successes - except sharing failure means exposure and vulnerability within an organization and in front of stakeholders. But sharing is not an end in itself. It is about learning from one another and paving new paths forward. Through sharing unintended outcomes, organizations can make new mistakes and know that they are contributing to a sector where taking risks and experimenting is laudable; it allows organizations to build resilience, which ultimately leads them to developing better solutions.

Fostering an open learning culture is key to **The MATCH International Women's Fund**'s success. MATCH supports continuous innovation and failure sharing with a standalone budget for all staff. MATCH staff have a practice of sharing their failures and learnings with each other every week. It's through such failure sharing that ideas emerged for an award-winning campaign, earning MATCH the CCIC Innovation Award in 2015.

WellAhead staff are also encouraged to share learnings and failures. For example, school district and WellAhead staff were invited to write monthly reflections and blogs on their experiences, key learnings and failures. These reflections were compiled and shared among school districts. Through this process of reflection and exchange, peers could learn from and support each other.

Failure stories at **Youth Fusion** are a way to build strength, learning, understanding and capacity. They collectively discuss how to pivot, what to refine and try again. This approach has enabled them to help over 20,000 youth complete elementary and high school. They credit their successful outcomes to their lessons harvesting and ability to continuously refine their approach.

CROWDS ARE A GOOD THING

Digital access to data, knowledge and insights can allow swift analyses, tune-ups and refinements. Crowdsourcing as an approach emerged in 2005 and has picked up significant speed and matured into a discipline. Benefits of crowdfunding can be: lower cost, higher speed, increased flexibility, and diversity of perspective - all ingredients for doing R&D well. Social mission organizations are practicing and realizing what the famous Leonard Nimoy once said, "the miracle is this - the more we share, the more we have." Platforms for discovery, collaboration, aggregation, and measuring are integral to advancing R&D.

The **MATCH International Women's Fund** uses Impact Mapper to track internal and external innovation projects. This system has been built by feminists and has features that allow for metrics that qualify movement building and synthesize data to support storytelling efforts. The platform is designed to articulate the collective impact in funding social movements. Their data is shared with partners and with other human rights funders.

At **Saint Elizabeth**, all R&D ideas and projects are tracked by their 'Triage Trio' and Growth and Innovation team and shared with staff through an online innovation platform on their mobile device.

Data knowledge management is a key component to **WellAhead**'s approach. Having a knowledge manager on the team to collect data, analyze, and lead developmental evaluation conversations allows WellAhead to reflect, pivot, and learn quickly together.

Framework, Timeraiser's parent organization, has set the stage and tone for the future they want to see in the social sector - radical openness, transparency and sharing. Through sharing budgets, event planning, and other program updates in real-time, they receive feedback and critical mass to refine and fine-tune rapidly. All team members, volunteers, and partner organizations have

GrantBook's workflow simulations

access to much of their innovations, audits, reports, and application program interfaces (APIs) under Creative Commons licensing. Data infrastructure underpins much of Framework's trials, pivots, and feedback. They pioneered open sharing and are empowering other not-for-profits to do the same.

BRIDGE THEORY AND PRACTICE

Social mission organizations connect theory and application through online platforms, in-person events, fellowships, and hosting communities of practice. Harnessing grassroots and field knowledge is proving to be an effective way to conduct R&D faster, cheaper and better.

At **Open North**, ideas for prototyping are generated internally and externally with the civic technology and open data community. A unique feature of Open North's way of working is that they straddle multiple sectors and communities, creating an element of interoperability. They act as bridge builders between different communities of practice and stakeholders, including academics, data producers and data users.

The **International Federation of Red Cross and Red Crescent Societies** developed their *Field Schools* in 2007; today members from different Red Cross Societies participate in the *Field Schools*. These exercises are a living organism, adapted based on the experience of participants (to ensure participants also learn from each other) and there are feedback loops at the end of each day that are used to continuously adapt the experience of the actual exercise.

WellAhead prototypes everyday practices in the school setting, implementing and iterating practices - coupled with learning, evaluation and scaling - to advance the integration of social and emotional wellbeing. This approach allows practitioners to act on small hunches in real world settings and evaluate quickly.

> **"**
>
> *R&D may have its greatest impact when it's put into the hands of everyone.*
>
> TIM BROWN

DRIVING SOCIAL R&D ADOPTION

Canada faces increasingly complex social and ecological challenges. Problem-solving fit for the 21st century demands leadership, financing, and capacity for R&D so organizations can shift their learning from slow and expensive to rapid and lean. The compelling practices highlighted in this report demonstrate the value of front-line R&D in enhancing lives. However, R&D is happening at the margins. We face significant hurdles in driving R&D adoption and legitimacy.

This report is the first of its kind in Canada.

It is an attempt to shine light on diverse practices that strengthen R&D capacity, capability and culture. Together, we can create a future of what it might be like if "the best of what is" today occurred more frequently, more rapidly, and in a systematic way across the country. As Tim Brown, CEO of IDEO once said, "R&D may have its greatest impact when it's put into the hands of everyone."

So, what's required to go further?

A number of questions remain. Who shares the onus of creating the conditions for and driving R&D adoption? What is the role of funders and government in building R&D capacity? Could a pooled R&D fund help de-risk and accelerate the pace and quality of experimentation? How might we build R&D bridges with Canadians living and innovating around the world?

The organizations highlighted in this report offered their perspectives on what it would take to make Canada's social impact sector world-renowned for continuous learning, rapid and high-quality experimentation, and data-savviness.

They identified three areas of importance:

- A **pooled R&D fund** that is purpose-designed to find, fund and support teams to: a) pursue high-potential front-line research and development, b) operate joint cross-organizational R&D and; c) identify and boot up right-sized technology, research and data infrastructure for their R&D. Organizations emphasized that explicit funding or incentives for pursuing R&D, putting R&D infrastructure in place, and boosting capacity is sorely lacking for this sector.

- Putting effort into developing **21st century R&D standards and benchmarks** moves the practice from early adopters and into the mainstream. Currently there are no standards that organizations pursuing R&D could use to compare, evaluate, track, communicate and benchmark their work.
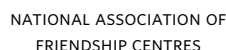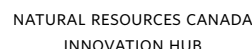
- A **learning platform and marketplace** to search, share, aggregate, demonstrate, crowd-source, transfer, and adapt insights, knowledge, and innovations. Such a platform would be context-based, and enable clusters and cohorts that are based on location, stage, outcome or demographic. An online learning marketplace would incentivize and support practitioners to codify, demo, share and teach other practitioners. Over time, this could boost the R&D talent pipeline in fields such as: ethnography, data science, digital technologies, user design, research and in addition, boost a variety of soft skills such as: adaptability, problem-defining, tenacity, empathy, among others.

We have our R&D hypothesis. We have early evidence that R&D matters and is making a measurable difference.

It will take years to generate breakthroughs across the above three areas, just like it took years for SpaceX to successfully land on a droneship. It will not work on the first try. We will fail. But we must push on. Refine our assumptions, questions and the design, and try again. And again. This report signals the urgency of our hypothesis and aims to spark action in order to boost R&D in the social sector. Perhaps, one day when my daughter is asked how she thinks social mission organizations improve lives, part of her proud response can be: through R&D.

ACKNOWLEDGEMENTS

Thank you to the following organizations for championing this exploration and for sharing their gutsy R&D habits to build an open body of knowledge that can benefit everyone.

CANADIAN RED CROSS / CROIX-ROUGE CANADIENNE

CENTRE FOR SOCIAL INNOVATION

COMMUNITY KNOWLEDGE EXCHANGE

4Rs YOUTH MOVEMENT

COMMUNITY FOUNDATIONS OF CANADA — all for community

WellAhead

ENGINEERING CHANGE LAB

THE J.W. McCONNELL FAMILY FOUNDATION / LA FONDATION DE LA FAMILLE J.W. McCONNELL

GRANTBOOK

IMPACT HUB Ottawa

NATURAL RESOURCES CANADA INNOVATION HUB

kudoz

MaRS

NATIONAL ASSOCIATION OF FRIENDSHIP CENTRES

NEW DAWN

Ontario Trillium Foundation / Fondation Trillium de l'Ontario — An agency of the Government of Ontario. Relève du gouvernement de l'Ontario.

OpenNorth

Regeneration COMMUNITY SERVICES

Saint Elizabeth — Well beyond health care

1125 @CARLETON

SKILLS SOCIETY

THE MATCH INTERNATIONAL WOMEN'S FUND

Centraide of Greater Montreal

PROJET IMPACT COLLECTIF / COLLECTIVE IMPACT PROJECT

F YOUTH FUSION

WEST NEIGHBOURHOOD HOUSE — Formerly St. Christopher House

engineers without borders / ingénieurs sans frontières Canada

research impact — turning research into action

BOLDNESS / THE WINNIPEG BOLDNESS PROJECT

TIMERAISER

YORK UNIVERSITÉ UNIVERSITY

APPENDIX - METHODOLOGY

Ap-pre'ci-ate, v., 1. valuing; the act of recognizing the best in people or the world around us; affirming past and present strengths, successes, and potentials; to perceive those things that give life (health, vitality, excellence) to living systems 2. to increase in value, e.g. the economy has appreciated in value. Synonyms: VALUING, PRIZING, ESTEEMING, and HONOURING.

In-quire' (kwir), v., 1. the act of exploration and discovery. 2. To ask questions; to be open to seeing new potentials and possibilities. Synonyms: DISCOVERY, SEARCH, and SYSTEMATIC EXPLORATION.

A central assumption of this exploration that, while there is yet to be a mainstream body of knowledge and practice around R&D in the social impact sector, there must be organizations across Canada pursuing Social R&D to continuously learn, develop, test and try new things in order to achieve social impact. The exploration started from a place of untapped potential rather than deficit or problem. This report is about curating and sharing inspiring accounts of the positive. Appreciative inquiry as a methodology was therefore a natural fit.

Appreciative inquiry is a fairly new asset-based approach from the field of organizational behaviour. It was first written about in an analytical footnote in a report in the 1980s and set the stage for David Cooperrider's dissertation, which is regarded as the first, and one of the best, articulations of the theory and practice of Appreciative inquiry. Lately, it has been garnering attention for its application in setting up for organizational and social change.

Appreciative inquiry looks at questions, issues and challenges in a unique way. Instead of focusing on deficits or problems, the inquiry is about discovering what works. Then, instead of analyzing possible causes and solutions, it is about envisioning what it might be like if "the best of what is" occurred more frequently in a systematic way. Appreciative inquiry leads groups to engage in a conversation concerning what is needed - both tasks and resources - to bring about the desired future. Finally, groups collectively implement and steward their desired changes. Appreciative inquiry argues that groups improve effectively through "discovery and valuing, envisioning, dialogue and co-constructing the future."[5]

From the close to 150 individuals and organizations engaged in SiG's Social R&D journey so far, as well as those not yet actively involved, the following were identified and invited for voluntary participation in this report:

The MATCH International Women's Fund
WOMEN'S AND TRANS* RIGHTS IN THE GLOBAL SOUTH

Saint Elizabeth
HEALTHCARE

Open North
DIGITAL TRANSPARENCY AND OPEN DATA

National Association of Friendship Centres
URBAN INDIGENOUS PROGRAMS AND SERVICES

Timeraiser by Framework
CONNECT SKILLED VOLUNTEERS AND CHARITIES

Kudoz
LEARNING EXCHANGE FOR ADULTS WITH COGNITIVE DISABILITY

Canadian Red Cross
HUMANITARIAN AID

Youth Fusion
EDUCATION FOR AT-RISK YOUTH

Regeneration Community Services
COMMUNITY-BASED HOUSING

Skills Society
SUPPORTING THE CITIZENSHIP OF PEOPLE WITH DISABILITIES

New Dawn
COMMUNITY ECONOMIC DEVELOPMENT

WellAhead
INTEGRATING WELLBEING INTO SCHOOLS

The Winnipeg Boldness Project
EARLY CHILDHOOD DEVELOPMENT

GrantBook
DIGITAL STRATEGY FOR GRANTMAKERS

The following screens were used to identify the initial set of organizations to profile:

EMBEDDED PRACTICE

Organizations that have a structurally and/or culturally embedded R&D practice or function or method (as opposed to having conducted a one-off innovation project) that was absolutely critical to achieving transformative impacts and outcomes.

DIVERSITY

In order to ensure a generous starting sample of R&D models, a breadth and variety screen was applied. While not entirely exhaustive of all Social R&D practices, models and contexts, there was an attempt to maximize diversity, given the need to maintain a manageable initial sample size. Identified organizations included those that would offer a diverse range of:

- locations (across Canada)
- generational leadership
- incorporation (charities, nonprofits and B Corps)
- mission scale (local, regional, national and international)
- maturity (from start-ups to long-serving organizations)
- relationships with their target systems (operating within a system or adjacent to it)
- models (collaborative projects, networks, funders, service agencies)

The following questions were used to craft short organizational R&D profiles and help to highlight inspiring practices and reveal pattern clusters. Questionnaires were the preferred method, as they are well-suited to capture, analyze, track and surface patterns in this context. Questionnaires also allowed for capturing quantitative and qualitative data. A questionnaire was emailed to each participating organization, directed to the individual or group responsible for curating R&D.

Responses to questions were provided directly or through relevant research, reports or other documentation. In each case, once a questionnaire was received and analyzed, we followed up to clarify or add further depth to any responses. All participants were notified that responses would not be for individual attribution and that this report would be shared widely under Creative Commons principles.

1. What is the innovative practice or breakthrough or model or approach that you think your organization is known for?

2. How is this practice funded? (Eg: self-funded, philanthropic, multi-sector combination, etc)

3. How would you say you define R&D within your context and organization? (Eg: incremental, disruptive, reaches unusual voices, etc)

4. How do you nurture staff passion and foster the capacity for R&D thinking and practice? (Eg: part of professional development, hiring practice, peer sharing, knowledge exchange, etc)

5. How do you incentivize and reward innovative thinking and approaches within your team? (Eg: dedicated time, embedded into job spec, pay bonus, carrot or stick, etc)

6. How are ideas for R&D generated within your organization?

7. Who generally leads R&D projects within the organization?

8. How are R&D ideas, insights, practices, solutions and models accessed across the organization? (Eg: online platform, knowledge sharing days, random water cooler chats, they don't get shared unfortunately, etc)

9. How is R&D progress and outputs tracked within your organization? If it is protected, why?

10. What might help you to conduct more R&D or scale your practices, approaches, models, solutions with the rest of the sector?

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