Field Notes:

Insights from Practitioners on Growing Social R&D

Jason Pearman

With Foreword by Dr. Alex Ryan, VP Systems Innovation, MaRS

Social Innovation Generation (SiG) is a collaborative partnership originally conceived in 2007 by The J.W. McConnell Family Foundation and developed in partnership with the University of Waterloo's Waterloo Institute for Social Innovation and Resilience (WISIR), the MaRS Discovery District, and the PLAN Institute. Our ultimate goal is to be a catalyst for supporting whole system change by contributing to changing the broader economic, cultural and policy context in Canada to allow social innovations to flourish. SiG intentionally engages partners across all sectors to create a culture of continuous social innovation.

Working with many other organizations and social innovators, SiG has advanced the concepts and tools of social innovation, social finance, social entrepreneurship, social labs and cross-sector partnership building in Canada. SiG endeavours to role model how new collaborative partnerships accelerate our ability to solve complex and pernicious problems.

Our current foci includes: enhancing social impact by building sectoral and regional social networks and ecosystems, and improving the social impact of Canada's innovation system by deepening the integration and deployment of social innovation within it.

MaRS Discovery District
101 College Street
Toronto, ON, Canada, K1P 5G4
Tel/Tél: 613.238.7160

www.sigeneration.ca | **@sigeneration**

Acknowledgements

Table of Contents

Foreword

Think of a social challenge today in Canada. Now imagine it has been eliminated. What is the path that got us from here to there? It won't be business as usual. It won't be a silver bullet. It's going to start with an experiment, on the frontline or in a lab connected to frontline services. It's going to be innovative, which means people won't understand it at first. Evidence will need to be gathered. Constituencies will need to be convinced. But as results are realized, and decision-makers are swayed, the scale of the solution can grow to meet the scale of the need.

Every organization faces a strategic choice between exploration (trying something new) and exploitation (doing what worked before). If you already have a winning strategy and you operate on a predictable and stable landscape, you should favour exploitation. If your current strategy will not get you where you need to go, and if your landscape is shifting rapidly and unpredictably, you need to do more exploration to survive and thrive. Today's social mission landscape in Canada demands more exploration than ever before. Social R&D provides a discipline to explore and experiment for our most important challenges. When it is embedded in frontline service, social R&D can deliver pragmatic breakthrough innovations grounded in the real needs of Canadians. As we solve for our own problems, we create leadership opportunities for Canada to improve billions of lives around the world.

If you've read Getting to Moonshot, you will have seen examples where social R&D is already happening across Canada. We need many more examples. In these Field Notes, the authors have distilled input from practitioners into actionable recommendations for how to grow a more connected, accelerated, visible, and world-class social R&D ecosystem. For civil servants, this means funding and valuing experimentation and learning as well as outcomes. For social sector funders, this means a shift in who, what, and how funding is allocated, with particular attention to ecosystem services that transcend individual programs. For academics, this means opening access to community data sets and peer reviewed publications to frontline practitioners, and increased participation in community-based research.

These Field Notes are a call to action to Canada's social sector: Let's invest in social R&D infrastructure. Let's create an ecosystem that cultivates and rewards bold and rigorous experimentation. Let's get as serious about investing in social R&D as transformative companies are about commercial R&D. Let's become international leaders in social innovation. Let's get started today!

Dr. Alex Ryan
*VP Systems Innovation
and Program Director
MaRS Solutions Lab*

Executive Summary

Like the private sector, Canada's social sector must have capacity, resources, technology and ability for research and development, or R&D, in order to generate knowledge and innovations that enhance the lives of the people it serves.

According to the OECD, Canada spends close to $300 billion on social outcomes and wellbeing per year[1]. However solutions are not keeping up with the rapid pace required to address pressing social and environmental challenges.

For example:

‣ The suicide rate among Canadian girls has increased by 38% over the past decade[2]

‣ Food insecurity prevalence rose to 46% in Canada's north - the highest rate since 2004[3]

‣ Hospital admissions for opioid poisonings have jumped 53% in the last decade, with 40% of that increase occurring in the last three years[4]

R&D in these and other acute challenge areas offers us a way to respond. Whether through physical community labs, research centres, dedicated teams, cross-organizational design and prototyping facilities, academic partnerships, or other means, social R&D is already happening.

Roots of Empathy, an organization founded in Toronto that fosters empathy and social intelligence among children via an evidence-based classroom program, has now expanded to more than ten countries. Jump MATH, a social mission organization focused on strengthening numeracy offers educators, tutors and parents complete and balanced math materials as well as training, has now expanded internationally including the United States and Spain.

[1] *"Social Expenditure - Aggregated Data," OECD StatExtracts. 2016*
[2] *Teen suicide on the rise among Canadian girls, BBC News. Accessed September 12, 2017. www.bbc.com*
[3] *Nunavut, Northwest Territories food insecurity reaches record level: study, CBC. Accessed September 12, 2017. www.cbc.ca*
[4] *Opioid poisonings land 16 Canadians in hospital each day, CBC. Accessed September 12, 2017. www.cbc.ca*

We know that **investing in R&D leads to transformative and scalable social innovations.**

While businesses in the private sector set aside $15.5 billion for in-house R&D in 2015, data from Statistics Canada indicate that during the same period, not-for-profits spent a minuscule amount, and typically don't have an inbuilt function for research and experimentation. Given the size of the social sector (consisting of approximately 180,000 organizations) representing 8.1% of GDP[5], and the potential for R&D to create new value in the sector, Social Innovation Generation (SiG) hosted a second Social R&D Practice Gathering in August 2017, bringing together people who are leading research, design, development and/or culture change across a range of social mission organizations. These include **E180** in Montreal**,** who are using machine learning to strengthen peer-to-peer learning, **Kudoz** who are applying ethnography in the disability sector in Vancouver, and **The Winnipeg Boldness Project** who are using social lab methods to create a new framework for childhood development in Winnipeg, among others.

This three-day program, the only one of its kind in Canada, was designed to cross-pollinate research and design methods, showcase experiments with new technologies, share insights and know-how, build and strengthen relationships, and surface the ecosystem conditions required for social R&D practitioners to do their best work.

This report captures highlights and actionable recommendations for practitioners, governments, funders and others who play enabling and supporting roles to grow this emerging field, and is a complement to the *Getting to Moonshot* and *Spring 2017 Roundtable* reports.

Highlights:

‣ **For social R&D practitioners:** elevating one's craft involves building new skills (from community-based research to analytics technologies), as well as taking on new roles (from knowledge translator to movement builder).

‣ **For the public sector:** creating awareness and capacity within departments to respond to the R&D needs of enterprising and high-performing social mission organizations would give the social innovation ecosystem a significant boost in terms of increased ability, quality and frequency of generating innovations. Practitioners discussed a few early opportunities, such as departments making anonymized outcomes data available and experimenting with regulatory sandboxes.

‣ **For the Government of Canada Social Innovation and Social Finance Strategy:**

---

[5] *Key Facts about Canada's Charities, Imagine Canada. Accessed September 12, 2017. www.imaginecanada.ca*

practitioners felt that this was a great opportunity to open up Canada's infrastructure for commercial R&D (funding, research support, promotion, etc.) to the social sector. For example, supporting R&D clusters in urban sustainability, immigrant settlement or youth homelessness; and establishing funding programs to support and incent R&D. Another significant gap that the strategy could help address is investigating the measures needed to ensure a pipeline of skilled talent to sustain the growth of this field.

- **For funders:** practitioners are eager to work with you to reimagine the granting process, and to build and maintain an ecosystem that improves the capacity, connectivity and infrastructure for R&D.

Finally, to support the growth of Canada's social R&D practitioner community, we propose the creation of a three-year field incubator with a **mission to make Canada's social R&D more connected, accelerated, visible, and world-class.**

LET'S JAM

Why Does R&D Matter ?

Over many decades, Canada's social impact sector has built strong capacity, capabilities and standards in volunteer management, service delivery and fundraising. In a way, these have become pillars of performance for the sector.

While these pillars remain essential, there is increasing consensus that lasting impact in a fast-changing world also requires capacity, resources and ability in research and development, or R&D.

In the private sector, R&D drives new and improved products and services, and is a key indicator of a company's and a sector's performance. We believe that R&D can also help frontline social mission organizations generate rapid and continuous advancements in services and solutions that enhance lives. However, currently only a small proportion of the approximately 180,000 social mission organizations have the organizational culture, capability, and funding to experiment and incorporate new research (like insights into how the brain works and how positive behaviours can be encouraged) or new technologies (like machine learning) or new methodologies (like prevention science).

Though a number of definitions are emerging, Social R&D can be described as the art and science of applying research and experimental processes on the frontline to generate new knowledge and new innovations that transform lives.

Social R&D practitioners use a range of R&D tools and processes including behavioural science, randomized control trials, lean prototyping, positive deviance, and ethnography across the spectrum of social change work from immigrant settlement and urban sustainability to youth employment and disability.

Examples:

The social enterprise InWithForward conducts R&D by using ethnographic tools and processes to better understand how adults with cognitive disabilities learn. This led to the creation 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, conducts R&D by using lean methodology to prototype and develop a number of innovations to advance volunteerism. This has led to more than 170,000 volunteer hours contributed by young professionals across Canada over the past ten years. 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.
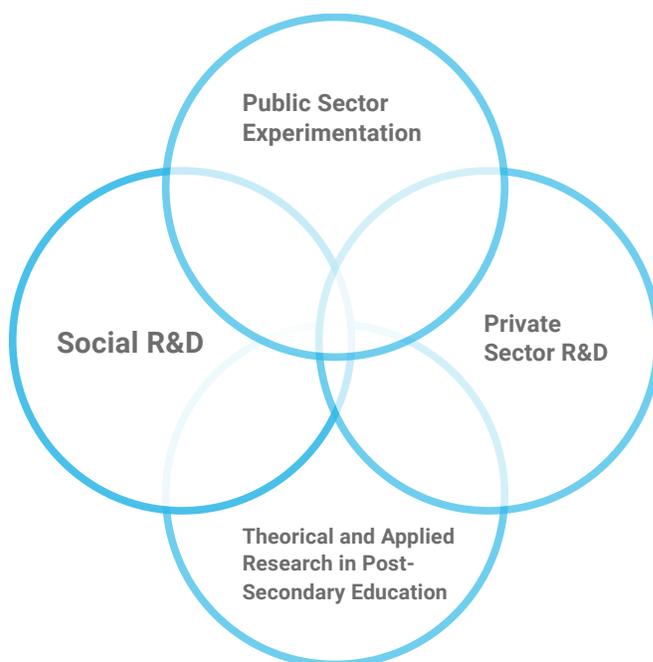
SiG's *"Getting to Moonshot"* report highlights many other examples of social R&D as well as this key ingredient to mainstreaming R&D across the social sector: **spaces for practitioners to convene** in order to exchange journeys, demonstrate experiments they're leading, learn new and share practices that work, cross-pollinate methods and support one another at a peer level.

To meet these needs, SiG has curated an annual Social R&D Practice Gathering - a multi-day retreat featuring a mix of talks, demo sessions, peer support groups and opportunities for co-creation - focused on enhancing R&D capacity and infrastructure so practitioners can pursue research and experimentation well. The 2017 Practice Gathering was hosted at a retreat centre outside of Ottawa and included 40-participants from across the country.

So how does social R&D connect to commercial R&D infrastructure?

Contemporary experience in G7 countries has shown that investment in innovation-triggered productivity gains and techno-economic growth alone is insufficient. As a result, thinking about the characteristics of innovation is changing. As Canada faces increasingly complex social, ecological and economic challenges, the innovation ecosystem must also support innovators and innovations that advance environmental, social and economic well-being. In other words, our innovation ecosystem must become more *inclusive*.

We envision Canada's innovation ecosystem becoming inclusive of social R&D such that knowledge, experiments, unique insights, capacity and infrastructure from across public, private, academic and social sectors are integrated to address grand challenges future.

Public Sector Experimentation

Social R&D

Private Sector R&D

Theorical and Applied Research in Post-Secondary Education

At the moment, the social sector is disconnected from Canada's R&D ecosystem. Growing and integrating the social R&D community as a full partner would result in an economy that is more inclusive, and the production of the next generation of social innovations that address our pressing social and environmental challenges.

At the moment, the social sector is disconnected from Canada's R&D ecosystem. Growing and integrating the social R&D community as a full partner would result in an economy that is more inclusive, and the production of the next generation of social innovations that address our pressing social and environmental challenges.

So where do we go from here? This report is derived from conversations at the 2017 Social R&D Practice Gathering and is broken into four main sections: Insights for Practitioners, Insights for the Public Sector, Insights for the Government of Canada Social Innovation & Social Finance Co-Creation Steering Group, and Insights for Funders. Each section corresponds to an audience that has a unique role to play in creating the early conditions for this field to grow. Each section also includes actionable recommendations stemming from practitioners' reflections on what allows them to do their best work. To conclude, the report extends **an invitation to make Canada's social R&D more connected, accelerated, visible and world-class.**

Insights for Practitioners

"I wish I had a community like this when I started."

The Practice Gathering stimulated rich conversation regarding new tools and methods that practitioners are actively experimenting with (and in some cases, mainstreaming) within their organizations, like co-research (e.g. working alongside affected communities to establish research questions and collect data), data science (e.g. using machine learning to run post-hoc tests on administrative data), and social impact bonds (e.g. using public sector pay-for-performance guarantees to secure investments to pursue social good moonshots).

That said, the messy business of managing a field research and experimentation portfolio, making room for R&D in an organization, and using R&D to unlock the transformation of a sector occupied most of our time together.

Key insights shared by participants on how to do R&D well:

1. *On managing an R&D portfolio*

Some practitioners operate a well-tuned R&D program that is poised to grow while others are just beginning their journey. Regardless of the maturity level of an organization's R&D function, practitioners cautioned against over-extending beyond internal capability, capacity and resources.

If leading an organization's efforts to grow and/or increase the sophistication of R&D efforts, do the following:

- ▸ Be deliberate in setting your operating principles/model - if not clearly established, you will be pulled in too many directions, which will compromise your ability to apply the necessary long-term focus to do the work well.

- ▸ Lobby hard to ensure you have core funding, not just an increment of funding associated with a program. Episodic funding sends a signal to the rest of the organization (i.e. integration of the R&D portfolio with the rest of the business-lines is temporary, and not the new normal). It also limits responsible teams to making incremental bets (i.e. easy wins) whereas the more in-depth and higher risk bets yield the highest ROI (return on investment).

- ▸ Explore off-the shelf tools (such as Trello, Slack, Experimentation Cards, etc.) for documenting and tracking experiments - it will become useful for synthesizing learning and insights from your R&D portfolio.

2. On connecting R&D to sector transformations

While R&D can help social mission organizations achieve incremental improvements in the form of more efficient and effective programs and services, practitioners were unanimous in their belief that social R&D could provide essential insights that could unlock the transformation of sectors.

To create an R&D program that enhances programs and services and works towards system change:

▸ Share what you're learning broadly and often, and gain leverage through the quality and prestige of your program.

▸ If appropriate, test for scale, such that the public sector can adopt elements of the model.

▸ Be wary of too sharp a focus on evaluating impacts on end-beneficiaries (usually a micro-targeted population that is potentially just a small slice of larger and interconnected populations).

▸ Foster relationships across ministries and between government, advocacy and service delivery partners to develop greater alignment and capacity for impact.

▸ Invest time to help governments and other established institutions understand the utility of novel tools and approaches, as well as thoughtful field research and experimentation.

3. On recognizing that social R&D is as much about influencing organizational culture as it is about research, invention, experimentation and scaling

The impact of an R&D portfolio will be clipped, if the knowledge, insights and experiences are not readily absorbed by the rest of the organization. You need to invest time to help build an organization that is able to both generate and synthesize new knowledge, and evolve.

Remember:

▸ Change isn't naturally sticky, so you need to influence the behaviour and routines of all actors involved. This means supporting the process of winding down certain established practices and "grieving the loss" of old stuff.

▸ To find the points of leverage: ask, "where in the system is there movement?" and "where is the motivation to change?" In tandem, build up your relational capital such that you have permission to intervene.

‣ To create pipelines for insights from the ground to make their way up and across your organization.

4. On shared challenges and opportunities in the social innovation ecosystem

Regardless of the domain - be it legal services, social services, or environmental conservation - a number of overlapping conditions and infrastructure would positively impact practitioners' work.

These include:

‣ Increased funding and legitimacy for social R&D practices.

‣ Available infrastructure to share data and unlock new insights by connecting dots that were otherwise hidden.

‣ A shared scanning function to identify emerging tools and methods, as there is always something on the horizon - ongoing scanning and funding for proof of concepts could help this sector keep pace with the rate of change.

‣ Having access to the talent needed to get good work done (especially specialized skills like data science, ethnography, agile and experimental design).

‣ Finding time to reflect, imagine and connect with other practitioners in order to reveal non-obvious possibilities and opportunities - an essential practice to help practitioners take care of their mental and physical well-being.

Practice Gathering 2017 results:
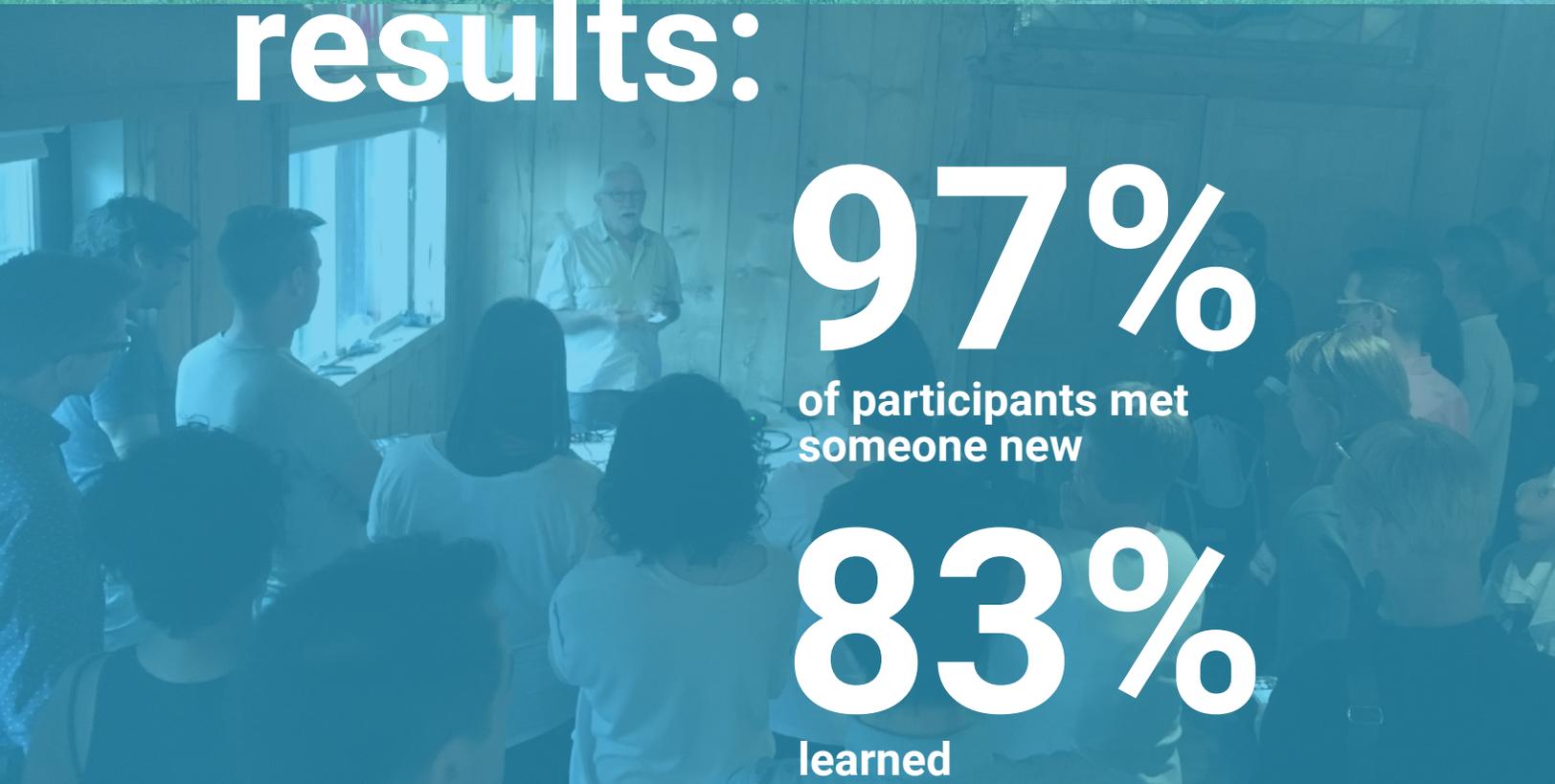
97% of participants met someone new

83% learned something new

**71%** gained a new perspective from another sector or discipline or region

Insights for the Public Sector

"We would love to pool money together into a collective fund, but I'm afraid CRA is going to stop us."

While Canada's social sector (consisting of approximately 180,000 organizations) represents 8.1% of GDP and is larger than the automotive or manufacturing industries[6], it remains one of the least supported sectors, with systemic barriers to accessing R&D infrastructure, talent and capital.

According to Renuka Kher, the Founder of Tipping Point Community's T Lab and international keynote for the Practice Gathering, one of the reasons for this deficit relates to mindsets: the sector and funders reward incremental improvements to proven solutions, overhead is seen as a sign of inefficiency or lavishness to be minimized, and R&D isn't something that the sector has the time or resources to do.
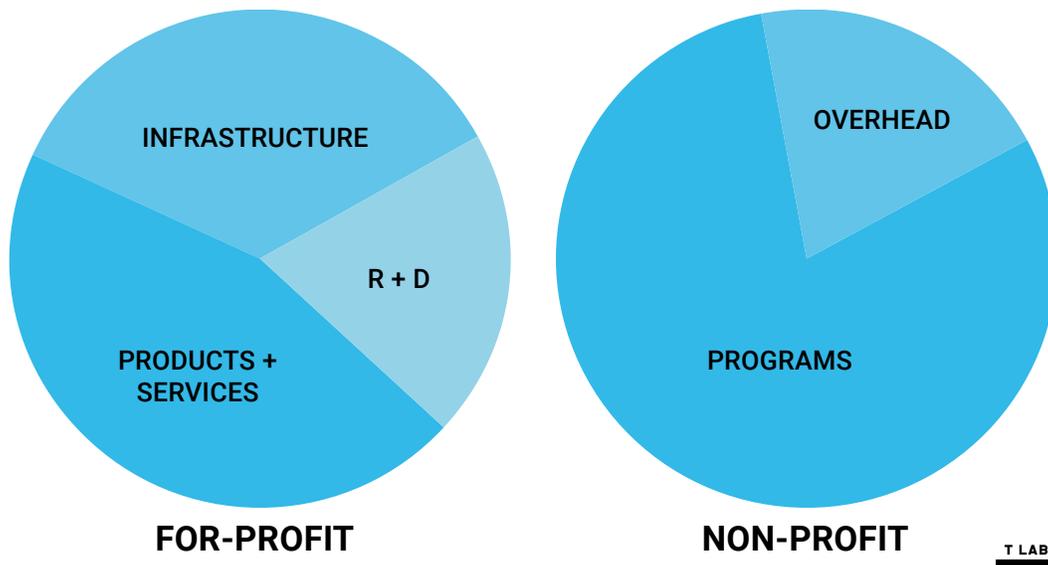
Breaking with convention, the Practice Gathering participants and their organizations have found a way to deliver services while at the same time invest in research, design, development and delivery of new practices and services. Given the chronic funding restrictions and the climate of risk aversion in this sector, they are taking extremely bold steps.

---

[6] *Key Facts about Canada's Charities (2016) Available at: www.imaginecanada.ca (Accessed: April 11, 2017).*

However, if we want to accelerate the creation of twenty-first century social innovations, we'll need to see dramatic growth in social R&D. As in the automotive and other sectors, R&D is the means to systematically unlock and exploit new knowledge in order to create new innovations.

Putting aside the lack of access to R&D support infrastructure, Practice Gathering attendees noted the following areas where the public sector could make concrete steps to help social R&D practitioners do their best work:

1. Make outcomes data available and invest in community-based research

The public sector has an abundance of outcomes data that if unlocked could reveal insights to fuel significant improvements in existing programs and services, and the discovery of new models. The *New Zealand Data Commons Project* is one of a number of approach that we could explore in Canada.

Social R&D practitioners find community-based research (working alongside affected communities as equal partners) to be a powerful research approach to generate actionable insights that matter, but there is no reliable funding to support practitioners' use of this model. Some funders do support academic labs, which may be a way forward.

2. Invest in inward facing experimentation, innovation and coordination to increase public sector's change agility

Practitioners have had valuable interactions with champions inside of government, but to see social R&D and social innovations mainstream, governments need to address things like:

‣ Duplication of documentation requirements across ministries - these are examples of taxes on productivity that highly innovative, and often small, teams can't absorb.

‣ Funding programs that remain outputs focused and biased to incremental improvements.

‣ A policy and program environment that locks in sector supports that are no longer optimal given changing conditions on the ground, and prevents integration of emergent tools and models.

Pursuing innovation in public administration would have significant add-on benefits for the social R&D community and the social innovation ecosystem.

3. Re-scope evaluation requirements for grant and contribution recipients to incent the capture of learning and unique insights

There is misalignment in expectations between what funders want measured, and what funding recipients and end-beneficiaries want measured.

In many cases, practitioners felt that current evaluation requirements incent reporting that confirms intended outcomes, not learning and sharing important insights that could significantly increase the ROI of public spending.

Finally, end-beneficiaries are typically a micro-targeted population with deep connections to other populations. Practitioners suggested that the generation of insights on adjacent populations alongside the impacts on targeted groups be supported.

4. Work with the R&D community to respond to the sector's emerging needs

Based on what practitioners are observing in the social innovation ecosystem, there are early signals that the following will become acute needs:

▸ Talent strategy for R&D in the social sector: to optimize the attraction, retention, growing and upskilling of talent; and explore the new ways of teaming and building a visible field of study and work.

▸ Obsolescence strategy: to socialize planned obsolescence as a key part of the innovation cycle, provide grants to support proper wind-down and transferring and distributing of assets; and to better understand what conditions make it desirable for planned obsolescence.

▸ Regulatory sandboxes: whether it's social impact bonds, artificial intelligence or data collectives, social R&D practitioners, government and ultimately affected communities will profit from protected spaces to experiment with interventions, partnership models, regulation and legislation.

▸ Funding for transformational experiments: to meet practitioners' ambitions of transforming the sector, they wondered what it could look like if 10% of grants and contributions funding was focused on supporting experiments that tested new paradigms in the social sector versus incremental improvements.

See Annex 3 for a full list of R&D craft session topics to find out what's top of mind for practitioners.

What evaluation tools or techniques can be used to ensure that R&D pilot efforts can be most impactful?

key insights from craft session #2

1 – misalignment between funder expectations and evaluation outcomes of experiments

2 – when planning evaluation focus on beneficiary not organization

3 – make sure to be aligned on which beneficiary to focus on - could skew evaluation to tell specific story

4 – continue to revisit purpose and audience b/c these could shift

Insights for the Government of Canada Social Innovation & Social Finance Strategy

" Get out of the everyday auto-pilot."

In support of the development of a national social innovation strategy, the Practice Gathering hosted a session with members of the Social Innovation and Social Finance Strategy Co-Creation Steering Group.

Practitioners provided feedback on the Steering Group's six areas of action, and shared insights on measures that would help strengthen Canada's social innovation ecosystem. Six recommendations emerged that tie to recurring themes from the Practice Gathering.

1. Research Tools

Gap: Access to research tools, infrastructure and publications in the academic, think tank, public and corporate sectors.

Actionable Recommendation: Influence research councils to work with social mission organizations on an open research framework that makes study data open to frontline social mission organizations while respecting considerations for publishing in academic journals.

2. Data and digital transformation

Gap: Incentives for testing emerging technologies and platforms such as machine learning and blockchain.

Gap: Incentives for organizational digital transformation in social / human services contexts were noted as weak.

Actionable Recommendation: Craft a digitization strategy for the social sector with a focus on creating conditions for modernizing operations and taking advantage of emerging ICT (information and communications technology) platforms.

3. Human capital

Gap: Insufficient talent pool in social R&D fields such as: design, data science, ethnography, behavioural science, human-centred design, prototyping and others is an ongoing bottleneck to growth of the ecosystem.

Actionable Recommendation: Craft a talent modernization strategy with a focus on skills for an innovative world.

4. Early-stage Funding

Gap: While there may be funding options for demonstrated solutions such as social impact bonds or innovation grants, practitioners shared that there is little-to-no funding for the earlier stages of R&D to invest in research for insights, problem-redefinition and design/prototyping or early A/B user testing.

Actionable Recommendation: Launch a social R&D fund with the corporate and philanthropic sectors that focuses on supporting: the generation of high-quality field research and experiments, organizational change, the development of R&D performance metrics, access to research infrastructure and capacity building.

5. Connectivity

Gap: Given Canada's vast geography, practitioners are looking for more consistent cross-ecosystem as well as domain- and community-oriented connections for better peer sharing and learning.

Actionable Recommendation: Support the development and testing of an ecosystem connections platform to complement in-person gatherings. Something that would enable the sharing of data and insights from experiments, and support the broad social R&D community as well as domain-specific and in-community clusters.

6. Awareness and visibility

Gap: Awareness building efforts for Social Innovation / Social Finance / Social R&D are not resulting in the ecosystem changes necessary for these practices to become mainstream. Some contributing factors include: the language being used doesn't resonate, the examples being used are dated or lack common themes and audience selection isn't strategic.

Actionable Recommendation: Focus outreach on public sector (policy, program and regulatory) and funders to reveal perverse incentives and bottlenecks that compromise the scaling of new and existing social innovations.

See *here* for SiG's policy recommendations on leveraging social R&D for Inclusive Growth.
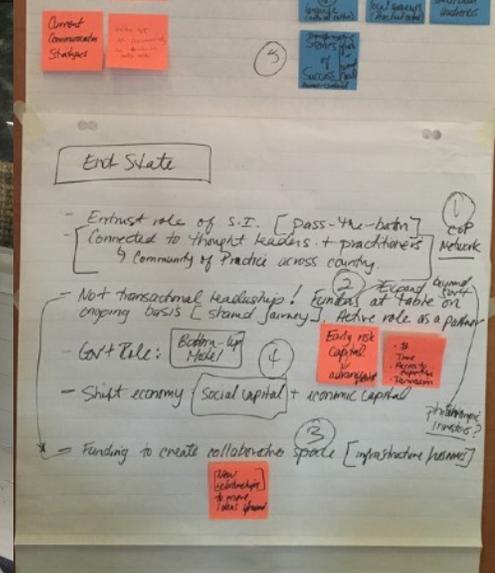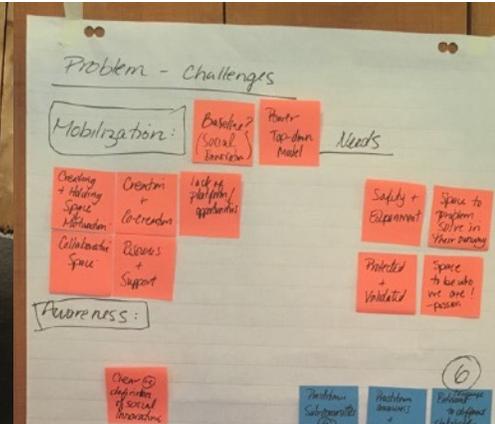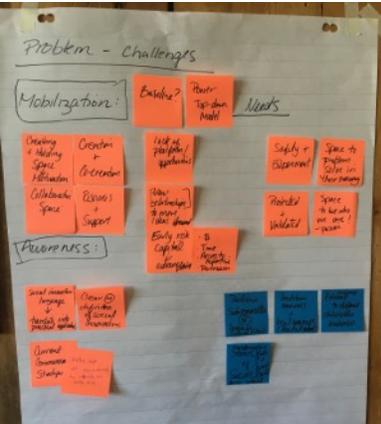
Insights for Funders

"We reward nonprofits for applying proven methods instead of testing new ones."

A number of the Practice Gathering craft session topics as well as the international keynote focused on shifts in the conventional funding process that would be supportive of mainstreamed social R&D.

The outcomes from these sessions align well with the recommendations from the March 29, 2017, *roundtable of social R&D practitioners and grant makers* in Ottawa.

Working together to explore some of these shifts and actionable next-steps could further strengthen the relationship between social R&D practitioners and funders.

1. Shift who gets funded

The transformations in other sectors are being led by non-traditional or new entrants. Practitioners reflected on how those funding social mission work could support atypical not-for-profits and charities, and landed on the opening up of eligibility requirements so that it's easier for new entrants to access funding and other supports, as well as funders spending time in context with practitioners to better appreciate good R&D as positive steps.

2. Shift what gets funded

Reflecting on typical grant processes, practitioners envisioned a model focused less on plans and programs and more on hypotheses and experiments, less about timelines and more about milestones, less about inputs/outputs and more about insights and learning.

3. Shift who decides and how decisions are made

Given that social R&D necessarily deals with emergent tools and methods, engaging a mix of practice/method experts, end beneficiaries, frontline professionals and content experts to review applications is likely important.

4. Shifts from supporting individual actors to creating enabling ecosystems

Support ecosystem partnerships for long-term grantee sustainability, as examples media for story-telling, universities for talent. Support development of ecosystem infrastructure and a suite of grantee supports (talent, experiment, infrastructure, connectivity, R&D performance metrics). Practitioners asked what it could look like if a portion of funding was dedicated to building and maintaining an ecosystem that improves the capacity of the sector as a whole.

In addition to the above, practitioners had a number of conversations related to the risk tolerance required to effectively fund social R&D. *Tipping Point Community,* based in the San Francisco Bay Area are mission-focused on supporting 1.3 million people too poor to meet their basic needs. Through their investment in T Lab, their R&D platform, they learned some important lessons in the early years that could be instructive:

- ‣ Only a fraction of promising R&D projects will demonstrate sufficient value to be taken to the next stage.

- ‣ Incrementalism holds back progress in the sector - bold bets are required to match the pace of change.

- ‣ It will take a minimum of 6 months of pre-work before a solid prototype can be crafted.

- ‣ R&D budget needs core funding, i.e. not be attached to a specific project or program.

Finally, reflecting on participants from the 2016 and 2017 Practice Gatherings, organizations pursue social R&D in a variety of ways, including: through physical community labs like Skill Society's Citizen Action Lab, research centres like Saint Elizabeth's Research Centre, dedicated teams like Vivo's research and innovation team, cross-organizational design and prototyping facilities like Grounded Space, academic partnerships like the former Community-University Research Alliance, among others. Funders will need to remain flexible as there is not one right way to pursue social R&D.

Act on Growing Demand: Creating Canada's First Social R&D Field Incubator

Social R&D is increasingly seen as an essential complement to the sector's current capabilities. From Exeko using cultural co-creation in Montreal to generate new innovations in social inclusion; to Kudoz applying ethnography in the disability sector to reimagine adult learning in Vancouver; to Skills Society experimenting with new services using lean prototyping in Edmonton, the field is gaining momentum across Canada. Fuelling the growth of R&D in the social sector requires a dedicated field incubator.

To keep up with growing demand, SiG recommends the creation of a three-year field incubator with a mission to make Canada's social R&D more connected, accelerated, visible, and world-class. Using a network model, over 2018-2020, the incubator will execute its mission by connecting practitioners and enhancing their capabilities; curating evidence, supports and knowledge; shifting policy conditions; and prototyping R&D infrastructure for the sector.

Over three years and beyond, not-for-profits and charities across Canada would benefit through:

‣ support to structure, set up and pursue frontline R&D;

‣ learning and exchange with a growing network of fellow R&D practitioners and experts from across Canada and around the world;

‣ fresh knowledge and insights about research, experiments and innovations;

‣ new knowledge and social innovations in a systematic and sustainable way; and

‣ a networked voice for the social R&D movement.

The goal is to boost skills, connectivity and infrastructure, and lower the cost and barriers to frontline research and experimentation for not-for-profits and charities. As the field matures, a 10% budget allocation for R&D in social mission organizations' budgets as well as embedded or shared research, design and development capacity and infrastructure would be a mainstay. In order to achieve this, a funding commitment is necessary to signal our intention to lead social R&D over the long term, as well as to structure partnerships with community-based labs, research centres, corporate R&D units, academic research networks and others.

Social R&D offers us the potential to solve our grand challenges within our lifetime. Let's seize this opportunity to act.

Overview of field incubator plan

OCTOBER - DECEMBER 2017 *Early validation, seed core funding, and development plan*	Early validation of pain points and business model, secure seed core funding and soft commitments on membership, develop initial brand, convene advisory group, identify an institutional home and create the beta field incubator plan.
2018 *Beta field incubator and initial proof points*	Beta field incubator is operationalized with core funding and network membership, and is executing on initial proof points across four verticals: connecting practitioners, curating evidence and knowledge, shifting policy conditions and prototyping R&D infrastructure for the sector.
2019 - 2020 *Refine and grow*	2019 to 2020 would move the field incubator out of Beta stage, with refined operations and governance, more stable revenue model, demonstrated proof points and growing member network and offerings.

Annex 1 - Attendee List

Amid Jan,
United Way Centraide Ottawa

Ajmal Sataar,
Inspire Nunavut

Alain Meunier,
Communagir

Amy Mapara,
Canadian Red Cross

Andréanne Martel,
*Canadian Council for
International Co-operation*

Anil Patel,
GrantBook

Ashley Good,
Fail Forward

Brendan Yorke,
Teach for Canada

Diane Roussin,
*The Winnipeg
Boldness Project*

Diane Urquhart,
*Social Planning
Council of Canada*

David Rauch,
City of Edmonton

David Bobier,
VibraFusionLab

Donna Dupont,
Solferino Academy

Gabe Sawhney,
Code for Canada

Jean-Marie Chapeau,
Centraide of Greater Montreal

Ian Capstick,
MediaStyle

Ismail Negm,
E180

Jason Pearman,
SiG

Jen Recknagel,
UHN OpenLab

Julie Aurore Rijpens,
*Social Innovators' Integration
Lab, McGill University*

Jocelyn Phillips,
Social Capital Partners

Kathy Manners,
The Boldness Project

Lauren Hunter,
Talent Cloud

Lee Rose,
CKX

Lynne Woolcott,
West Neighbourhood House

Melissa Gerrard,
Sustainability Co-Lab

Michael Lenczner,
Ajah / PoweredByData

Nadia Duguay,
Exeko

Nicole Daw,
Vivo

Nisa Malli,
City of Toronto

Renuka Kher,
Founder, T Lab

Ryan Ness,
*Toronto and Region
Conservation Authority*

Sarah Schulman,
InWithForward

Stephanie Baker Collins,
*Social Work, McMaster
University*

Supriya Syal,
*Privy Council Office
Innovation Hub*

Suzanne Denniston,
Engineering Change Lab

Talisha Ramsaroop,
Social Planning Toronto

Tracey Robertson,
Ontario Trillium Foundation

Vinod Rajasekaran,
SiG

Wilfred Cheung,
*United Way
Toronto & York Region*

Annex 2 - Practice Gathering Agenda

The following, summarize the main sessions from the 2017 Social R&D Practice Gathering:

Demo Sessions

This was sounding board time is to demonstrate a project, a product or idea to receive feedback from participants.

Demo Session *presentations*

ONE	▸ David Rauch, BetaCity YEG, Edmonton (on x-sector invention) [CivicTech]
	▸ Nadia Duguay, Exeko, Montreal (on co-research) [Social Inclusion]
	▸ Jocelyn Phillips, Social Capital Partners, Toronto (on multi-arm experiments) [Social Finance]
	▸ Jen Recknagel, UHN OpenLab, Toronto (on scaling innovations)[Health]
TWO	▸ Ismail Negm, E180, Montreal (on machine learning) [Adult Learning]
	▸ Donna Dupont, Solferino Academy, Geneva (on foresight) [Humanitarian]
	▸ Michael Lenczner, Ajah / PoweredbyData, Montreal (on data collectives) [Social Sector]
	▸ Sarah Schulman, InWithForward, Vancouver (on R&D collectives) [Social Services]
THREE	▸ Nicole Daw, Vivo, Calgary (on organizational preparedness for R&D) [Youth]
	▸ Ajmal Sataar, Inspire Nunavut, Ottawa (on practitioner preparedness for doing R&D) [Social Enterprise]
FOUR	▸ Anil Patel, GrantBook, Toronto (on capturing insights) [Social Sector]
	▸ Ian Capstick, MediaStyle, Ottawa (on structuring healthcare moonshots) [Health]
	▸ Julie Aurore Rijpens, Montreal (on mapping social economies) [Social Enterprise]

R&D Craft and Deep Dive Sessions

These were small group sessions to share knowledge, gain insights and better questions from your peers on an R&D topic or program of interest. The full list of proposed craft sessions is in Annex 3.

Craft and Deep Dive Sessions

CRAFT 1	‣ Delivering your program + working on system change; ‣ Benefits & limitations of social impact bonds; ‣ Infiltrating innovations into enviros incentivized against risk
CRAFT 2	‣ How to design our organizations for social R&D, innovation, experimentation, and agility ‣ How to increase funding and legitimacy for social R&D practices ‣ What evaluation tools or techniques can be used to increase ROI of R&D (pilots) efforts ‣ What does good obsolescence look like?
DEEP DIVE 1	‣ Fellowship Programs & Talent Platforms (hosted by: Lauren Hunter, Gabe Sawhney, and Lee Rose) ‣ Accessible Consultation (hosted by: Nisa Malli and David Bobier)

Innovation, Philanthropy, & the Future of Work

Anil Patel (GrantBook) presented on the habits of organizations leading the transformation of other sectors, and what social mission organizations need to be thinking about in order to retool the social sector.

International Keynote Session

Tipping Point Community: An R&D engine for social impact in San Francisco

Renuka Kher, the Founder of Tipping Point Community's T Lab, *presented* on navigating challenges of introducing an R&D practice into an organization, and highlight the capacities, culture, and connectivity required to support the development of embedded R&D capacity in frontline grantee partners.

Government of Canada
Social Innovation / Finance Strategy Consultation

Practitioners shared insights with staff from Employment & Social Development Canada and Innovation Science & Economic Development, as well as with members of the Social Innovation/Social Finance Co-Creation Steering Group to help strengthen Canada's social R&D ecosystem in order to generate more viable, inclusive, and scalable innovations.

Next Steps: Strengthening Social R&D in Canada

Practitioners spent time reflecting on what Social Innovation Generation can prioritize doing over the coming months in order to make tangible progress in strengthening social R&D in Canada.

Annex 3 - R&D Craft Session Topics

The following represents a preliminary grouping of the craft session topics:

Shared Infrastructure Needs

- ▸ What could a foresight ecosystem look like? Inclusive:

- ▸ Strategic (expert dialogue)

- ▸ Participatory (social dialogue)

- ▸ How can organizations from multiple sectors work together to ensure that the social innovation landscape has the talent it needs to get good work done (especially specialized skills needed to work on wicked problems)?

- ▸ Should we be setting up community/place-based social R&D spaces instead of organization based units?

- ▸ How do we effectively scale a community-based model and ensure the right ingredient are being replicated for success?

- ▸ Where are the system gaps where vulnerable people are falling through the cracks?

- ▸ How do we tie the research together that we already have?

Bottlenecks for mainstreaming social R&D

- ▸ How do we get the big funders (who are part of the system) to fund truly transformative system change projects?

- ▸ How to increase funding and legitimacy for social R&D practices

- ▸ What are the non-economic barriers for social R&D that we can solve for?

- ▸ Do we need to re-design our work so this isn't on the side of a desk?

- ▸ What is the role of social R&D in making sure our interventions are more than just bandaids on broken systems?

- ▸ How to create workable structure and engagement of all partners from the start

How to increase impact of practitioner's work

- ▸ Strategies for delivering your program + working on system change;

- ▸ What evaluation tools or techniques can be used
  to increase ROI of R&D (pilots) efforts

- ▸ How do we cross the chasm from early adopter to early majority?

- ▸ Infiltrating innovations into environments incentivized against risk

- ▸ How to design our organizations for social R&D, innovation,
  experimentation, and agility

Emerging Tools / Approaches

- ▸ Benefits & limitations of social impact bonds;

- ▸ Inclusive R&D: sharing practice where no one is a subject, and everyone
  is a co-researcher

New Perspectives

- ▸ What does good obsolescence look like?

- ▸ What do we mean by accommodation and accessibility
  and why do we keep overlooking it.

- ▸ How may we create an inclusive and robust foresight practice?

- ▸ Meaningful citizen engagement

- ▸ Codifying knowledge to inform broader strategies

- ▸ How can we apply a trauma-informed lens to social R&D?

- ▸ Where have we messed up?

- ▸ Why is it so hard (for you to change)?

#SocialRD