EXAMINING ORGANIZATIONS SUPPORTING POSITIVE SOCIAL CHANGE: A REPORT PREPARED FOR 10 CARDEN

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Summary: The following report represents the final product of a collaborative research partnership between members of the 10 Carden team and the University of Guelph’s Research Shop. This report summarizes the findings from semi-structured interviews conducted with representatives from seven non-profit organizations in Canada that support positive social change and/or social innovation in some capacity. The participants in this study include members in a leadership role within their organizations, as well as cutting-edge players operating in the non-profit sector. The data collected from the interviews have been summarized in table format, and identify how the selected organizations work in innovative ways with respect to governance, membership, decision-making, and power sharing (see Table 1). A second table is also included which captures a list of organizations and literature recommended by participants to consult and examine for the purpose of future research in this area (see Table 2). Additionally, insights from several articles have been integrated into this report to augment the findings from the interviews. These insights are included in the Conclusions section and the key terms section of the Introduction.
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INTRODUCTION

RESEARCH GOALS
This study used key-informant interviews to capture the information shared by representatives from seven Canadian non-profit organizations, working at both national and international levels, to support positive social change and/or social innovation in some capacity. Specifically, this research aims to identify how organizations work in innovative ways with respect to governance, membership, decision-making, and power sharing, in an effort to inform the work of local social innovation organization, 10 Carden.

A review of some key articles from the social movement and global civil society literature, as well as grey literature outlining the collective impact and design thinking approaches, expands on what emerged in the interview process and reiterates some of the central strategies and big-picture thinking that is informing the work of ‘social enterprises’ or organizations operating to support innovation in the social arena.

BACKGROUND
10 Carden, a space-sharing organization located in downtown Guelph, is a gathering place and an incubator for researchers, organizations and entrepreneurs driven by their passion for social change. As 10 Carden’s membership grows and the organization’s work expands, identifying ways that other organizations with similar mandates are operating can provide valuable information to promote dialogue and action at 10 Carden. Canada’s non-profit sector is growing, and the opportunities for working in this space are immense. As 10 Carden seeks to continue to support community collaboration and the exchange of ideas in a shared space setting, consulting other organizations about their best practices and ideas for ‘growing the work’ is a valuable step in the evolution of 10 Carden’s mission. This study has aimed to contribute to the refinement of 10 Carden’s strategy for growth and development as an organization. In line with 10 Carden’s vision to serve as a ‘community hub’, this study has consulted organizations with a mandate to support the building of community and social innovation in some capacity, in order to get a sense of how other organizations are structured and do their work effectively in the day to day. Moreover, the insights provided by the representatives interviewed working in leadership positions within their respective organizations can hopefully inform 10 Carden’s work process, and support the continued vitality of the organization over time.
Key Terms:

- **‘Global Civil Society’** – “a space where things happen...It is the place where social movement organizations, international research and advocacy networks, global policy bodies, as well as a wide variety of non-governmental and international non-governmental organizations, interact with states, United Nations and other intergovernmental bodies and the private sector itself” (Hall, 2000, p. 2). Budd Hall, renowned scholar who has been publishing research for decades about civil society organizations, elaborates on his conceptualization of global civil society, denoting that global civil society provides a space within which local, national, regional or international civil society structures can work in concert to support the ongoing “creation of ways to strengthen communication, coordination, reflection and capacities to act among the discrete organizational forms which already exist” (2000, p. 2). Hall argues that a complex and elaborate civil society is emerging in the context of, and in response to, global economic consolidation. Global civil society represents a point of entry into confronting the challenges and opportunities presented by globalization. The non-profit organizations consulted for this study are global civil society structures, and the networking they do in their work, with and for community, represents a key practice of global civil society (Hall, 2000).

- **Collective Impact** – the commitment of a group of actors from multiple sectors to a common agenda for solving specific social problems.¹

- **Design Thinking** – a human-centred design approach to innovation and a problem-solving methodology originally utilized by businesses, but that is increasingly being utilized by organizations operating in the non-profit sector, to address the needs of the people who will consume a product or service, and to develop solutions to social problems. Design thinking uses local expertise and capacities to uncover local solutions to social problems.²

- **Positive social change** – a deliberate process of creating and applying ideas, strategies, and actions to promote the worth, dignity, and development of individuals, communities, organizations, institutions, cultures, and societies. Positive social change results in the improvement of human and social conditions.³

- **Social innovation**: “Social Innovation refers to new ideas that resolve existing social, cultural, economic and environmental challenges for the benefit of people and planet. A true social innovation is systems-changing – it permanently alters the perceptions, behaviours and structures that previously gave rise to these challenges. Even more

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¹ See [http://www.ssireview.org/articles/entry/collective_impact](http://www.ssireview.org/articles/entry/collective_impact) for more information on Collective Impact.

² See [http://www.ssireview.org/articles/entry/design_thinking_for_social_innovation](http://www.ssireview.org/articles/entry/design_thinking_for_social_innovation) for more information on Design Thinking.

³ Definition provided via Walden University. See [http://waldenpdk.org/programs/May05_socialchange/socialchg.pdf](http://waldenpdk.org/programs/May05_socialchange/socialchg.pdf)
simply, a social innovation is an idea that works for the public good. Social innovations come from individuals, groups, or organizations, and can take place in the for-profit, non-profit, and public sectors. Increasingly, they are happening in the spaces between these three sectors, as perspectives collide to spark new ways of thinking.  

METHODS

COLLABORATION
This report represents the findings from a collaborative research partnership between members of the 10 Carden team (Annie O’Donoghue, Julia Grady, Elizabeth Pinnington, and Beth Parks) and members of the University of Guelph’s Research Shop (Clare Morgan and Anne Bergen). The Research Shop and 10 Carden have an established working relationship, and the Research Shop paired Clare Morgan, working as an Intern through the Research Shop, with 10 Carden. Anne Bergen, postdoctoral fellow at the Research Shop, served as a project manager throughout the duration of the process.

Collaboration occurred from the outset of the research process with the shared identification of the research problem. Members of the 10 Carden team identified organizations that they were interested in learning more about through this study. Shared decision-making occurred throughout the duration of the study, as the list of organizations shifted and the goals of the study were refined iteratively. In addition, a number of articles identified by Annie O’Donoghue and Elizabeth Pinnington, including relevant articles identified by Elizabeth Pinnington and Clare Morgan written by Budd Hall (1989, 2000), have contributed to the insights presented in this report.

SOURCES
In addition to members of the 10 Carden team deciding which organizations were to be included in this study, an environmental scan approach was utilized to identify organizations, as well as snowball sampling based on the recommendations of participating organizations. Requests to participate in the study through a short informational interview were sent to 10 organizations (some operating at only the national level, others at both the national and international levels).

4 Definition taken from the Centre for Social Innovation website. See http://socialinnovation.ca/about/social-innovation

via email. After the initial recruitment phase, telephone interviews with representatives from 7 organizations took place. The interviews were semi-structured, and lasted between 15 and 45 minutes in duration (see interview questions in Appendix F).

PARTICIPANTS

Interviews were conducted with members in a leadership role within their organizations (i.e. president, founder/co-founder, executive director, principle project officer, director of programs and operations, or manager). The participating organizations and their representatives consisted of:

- **Framework Foundation** (Anil Patel, co-founder and executive director) [http://www.frameworkorg.org/](http://www.frameworkorg.org/) - Established in 2002, Framework Foundation is a growing non-profit that aims to empower Canadians to participate in volunteering and philanthropy, with a particular emphasis on promoting citizen engagement amongst Canadians in their 20s to 30s. Framework helps volunteer agencies find the skilled people their organizations need by facilitating connections between a variety of groups including young citizens, businesses, charitable and not-for-profit agencies and emerging artists.

- **Schools Without Borders** (Chris Kang, founder) [http://www.swb.ca/](http://www.swb.ca/) - Schools Without Borders is a non-profit that supports community learning initiatives in partnership with grassroots educators and learning communities around the world. SWB’s provides training, mentorship and “back-office” support to over 25 youth-led educational initiatives in Canada, Brasil, and Kenya. SWB’s Learning Centre in Toronto provides a physical hub for young educators to collaborate and innovate.

- **Tamarack Institute** (Paul Born, president) [http://tamarackcommunity.ca/](http://tamarackcommunity.ca/) - Tamarack is a non-profit that develops and supports collaborative strategies that engage citizens and institutions from a variety of sectors to solve major community challenges, and to learn from and share these experiences. Tamarack sponsors projects and provides learning resources, training, coaching and strategic consulting that enable people to collaborate and learn with and from each other in an effort to build stronger communities.

- **Santropol Roulant** (Chad Lubelsky, executive director) [http://santropolroulant.org/2009/E-home.htm](http://santropolroulant.org/2009/E-home.htm) - Santropol Roulant is a Montreal-based not-for-profit organization founded and run by young people in the community. Santropol Roulant brings people together and builds community across generations and cultures through a food-delivery service, intergenerational activities and volunteer programs.

- **Dodem Kanonhsa** (Amy Desjarlais, manager) [http://www.dodemkanonhsa.ca/](http://www.dodemkanonhsa.ca/) - Dodem Kanonhsa is a learning and sharing facility that fosters greater acceptance, understanding and harmony between members of First Nations and Non-Aboriginal People. While promoting the sharing and understanding of Aboriginal Culture and its philosophies, Dodem Kanonhsa aims to support intercultural relations and cross cultural communication.
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- **The J. W. McConnell Family Foundation** (John Cawley, director of programs and operations) [http://www.mcconnellfoundation.ca/](http://www.mcconnellfoundation.ca/) - The J.W. McConnell Family Foundation is a private philanthropic organization funding programs that support Canadians in building a more innovative, inclusive, sustainable, and resilient society. In operation since 1937, the organization aims to improve the quality of life in Canada by building communities that help people develop their potential and contribute to the common good.

- **Caledon Institute of Social Policy** (Anne Makhoul, principle project officer) [http://www.caledoninst.org/](http://www.caledoninst.org/) - The Caledon Institute of Social Policy is a private, nonprofit organization with charitable status. Established in 1992, the Caledon Institute of Social Policy does rigorous, high-quality research and analysis; seeks to inform and influence public opinion and to foster public discussion on poverty and social policy; and develops and promotes concrete, practicable proposals for the reform of social programs at all levels of government and of social benefits provided by employers and the voluntary sector. While Caledon focuses on Canadian issues, it draws upon international experience and innovations in social policy.

**Note:** John Cawley of the J. W. McConnell Family Foundation and Anne Makhoul of Caledon Institute of Social Policy were contacted as “innovative” organizations based on the initial interests that the 10 Carden team had in learning more about their approaches to governance, membership, decision-making and power sharing. Instead, both representatives from these two organizations opted to participate in this study by offering recommendations for other organizations to contact. These two participants saw the organizations they recommended as ‘better fits’ based on the research goals. See Table 2 for these recommendations.
# RESULTS/FINDINGS

## TABLE 1: SUMMARY OF KEY FINDINGS FROM INTERVIEWS

<table>
<thead>
<tr>
<th>Organization, Participant</th>
<th>Governance Structure</th>
<th>Decision-making processes</th>
<th>Membership (Intake process)</th>
<th>Power Sharing</th>
<th>Guiding Principles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Framework Foundation</strong></td>
<td>- <em>Share by Default / The Sharing Imperative</em>: Information shared online &amp; in real-time for public to provide feedback. - <em>Flat</em> organization. - All staff members responsible for marketing, customer service, fundraising, volunteer engagement, etc., on top of their specific duties.</td>
<td>-5 staff &amp; 250 volunteers, with 50 engaged all year. - Intake process: members self-select into the work based on their expertise &amp; interests.</td>
<td>- <em>Decentralizing knowledge</em> by making it more accessible to more people. - Financial, operational and programmatic information made available online and in-real time.</td>
<td>- <em>Curated sharing</em>: the relevant information to the right people. - <em>Predictability</em>: reduce amount of time spent reporting on activities, more time spent reporting on <em>impact</em>.</td>
<td>- See 2 slides in Appendix A.</td>
</tr>
<tr>
<td><strong>Schools Without Borders</strong></td>
<td>- Currently in flux. See decision-making processes column and Appendix B for more information.</td>
<td>- Transitioning from <em>circular</em> or <em>inside-out model</em> (decision-making by consensus approach) to <em>flexible system</em> (one record of information about work made available online so members can step in and out).</td>
<td>- Small membership. - Deep relationships with the people and groups who are involved.</td>
<td>- Diverse representation on the board reflects all iterations of SWB. - Online system: decisions tracked, reports filed, records kept online re: what happens at organizational level promoting <em>visibility &amp; transparency</em>.</td>
<td></td>
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*Anil Patel, co-founder and executive director*

*Chris Kang, founder*
<table>
<thead>
<tr>
<th><strong>Tamarack Institute</strong></th>
<th><strong>Santropol Roulant</strong></th>
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<tbody>
<tr>
<td>- Traditional charity structure: President reports to board of directors.</td>
<td>- Classic structure: members elect board of directors who hire executive director, who manages and supervises staff.</td>
</tr>
<tr>
<td>- 30 associates form a steering committee around the governance of ideas.</td>
<td>- 2 levels of hierarchy within staff team: (i) the executive director (ii) rest of the members are at the top of our organizational hierarchy.</td>
</tr>
<tr>
<td>- See Appendix D: information on decision-making processes integrated throughout the transcript.</td>
<td>- Weekly meetings held for staff to set weekly agenda and update the work – a collaborative process with different people facilitating this.</td>
</tr>
<tr>
<td>- 12,000 members called thought leaders with strongest ideas advance the thinking.</td>
<td>- 15 staff members make things run, with 100 volunteers delivering the service (food).</td>
</tr>
<tr>
<td>- Intake process: invited in.</td>
<td>- Intake process: Invitation to participate and then invitation to deepen participation.</td>
</tr>
<tr>
<td>- Learning community model: 3 areas of learning operated as campaigns.</td>
<td>- Members set the terms of how they participate.</td>
</tr>
<tr>
<td>- Work in collaboration with the fourth sector: people with lived experience in the issue at hand (ex. poverty).</td>
<td>- Aim for maximum transparency: every member is aware &amp; given an opportunity to participate.</td>
</tr>
<tr>
<td>- Fourth sector voices included on all issues that the organization works on.</td>
<td>- Culture of feedback: discussion &amp; dialogue encouraged.</td>
</tr>
<tr>
<td>- Founded around the principle of building ‘learning communities’ for social change.</td>
<td>- Having explicit conversations about power is promoted.</td>
</tr>
<tr>
<td>- See interview transcript attached in Appendix D. In particular, see the section entitled The Tamarack Methodology and the Guiding Principles section.</td>
<td>- See Discussion of Key Findings section below and/or Appendix C for 9 Core Principles of Engagement.</td>
</tr>
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Dodem Kanonhsa - Amy Desjarlais, manager

- Partnership structure. -2 supervisors manage the manager: one from Aboriginal Affairs & Northern Development Canada (AANDC) and one is the executive director from the Native Canadian Centre of Toronto.
- Set of policies & guidelines steers the work.
- Hierarchical decision-making: not based on a First Nations (i.e. circle) structure.
- Hierarchy includes manager, her supervisors & advisory committee comprised of AANDC & Native Centre employees.
- Native Centre instrumental in how Dodem Kanonhsa is organized.
- Native Centre is organization’s connection to wider Aboriginal community.
- Manager involves wider Aboriginal community via feedback and asking members on contact list what they want to see in programming.
- Inclusivity: open to both Aboriginal and non-Aboriginal people with the hope that it will benefit intercultural relations, cross-cultural communication and understanding.
DISCUSSION OF KEY FINDINGS

This section includes more in-depth information shared by representatives from the organizations regarding their approaches to governance, decision-making, membership, power sharing and guiding principles. Information that is redundant with what is provided in Table 1 has been excluded.

Framework Foundation

Governance
Framework focuses on Sharing as a central governance question. Framework has established an open-sourced, ‘power of the crowd’ model in terms of governance, meaning that members of the general public who are interested can be involved in the organization through providing comments and feedback online and in real-time. Transparency is fundamental to how the organization works and how governance is organized. According to Anil Patel, “this model is really going to dominate the non-profit sector in years to come. Sharing is the future, and organizations that get it right are going to do well” (Personal communication, co-founder and executive director, April 20th, 2012). The organization has termed this approach ‘the sharing imperative’ or ‘share by default’.

Decision-making
Anil Patel described Framework as being a ‘flat organization’, meaning that at Framework all staff members are responsible for marketing, customer service, fundraising, volunteer engagement, etc., on top of their specific duties. The organization has a goal of making quick, informed and thoughtful decisions that are transparent to the wider community online and in real-time.

Membership
Framework takes a ‘pick a menu of ways to get involved with us’ approach as an intake process. A major benefit of this approach is that members from across the country can become involved, as they select from a ‘menu’ of possibilities. The board members list ten high-level governance pieces and explicitly state that the organization needs board members to consider doing five of the ten, as opposed to telling board members what they have to do. Therefore, members are asked to write their own journey and to participate based on their expertise, interests, and availability.

Power Sharing
Anil Patel stated that because ‘knowledge is power’, Framework is working to decentralize the knowledge in the organization by making it more accessible to more people. In order to do so, the organization is asking questions about what the public thinks about the various ideas that the organization is grappling with, rather than assuming that it is only a handful of people at the board level who are the ultimate gatekeepers for good decisions and/or bad decisions. The organization is working to turn their knowledge inside out, and they do
this by making more of their financial, operational and programmatic information available online and in-real time.

Guiding Principles
The principle of ‘curated sharing’ (i.e. the relevant information to the right people) drives Framework’s governance model and way of thinking about new ways of sharing – online, in real-time, and anywhere – through innovative technological platforms such as cloud, mobile, and other social computing tools. Predictability is another core principle; therefore information is openly shared online so that the public and the organization’s members have access to financial, operational and programmatic information. The use of technology to facilitate sharing information about the organization’s work online, allows Framework to achieve this principle more effectively.

Schools Without Borders

Governance & Decision-making
Schools Without Borders (SWB) is currently in a state of transition. The organization experimented with trying to have an inclusive and integrated decision-making process with a variety of members from the wider community and their partner organizations participating by being organized into working committees. SWB had a circular, or inside-out model, whereby board meetings were opened up to staff and members, and took a decision-making by consensus approach within the organization. However, this approach proved to be very labour intensive; a lot of organizational energy had to be used just to manage relationships. Therefore, SWB has recently been transitioning to more of a ‘flexible system’, where the organization is consolidating one source of information as a central record of everything that SWB is working on, in order to minimize duplication. This approach allows people who want to be involved in the work to step in and out where it makes sense for them. SWB is using technology in order to transition to this flexible model, utilizing the cloud computing platform to store files regarding decision-making and to track what items and issues should be made available to the public through this technological platform. Members of the SWB team felt that this transition was necessary in order to deal with the realities of how organizations exist today and of how busy people are, and to help volunteers use their time effectively and productively. Within this new model, the organization has decided that board members need to be selected appropriately and have a certain skill set – there needs to be a certain level of knowledge and time that members can contribute to the work. Chris Kang asserts that “it’s really difficult to implement innovative governance models, and you really need to have a dedicated core group that are committed to that – you need at least two or three people for
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it to survive but you need four to six people for it to grow. So there are a lot of moving pieces to it” (Personal communication, founder, April 24th, 2012).

Membership
Currently SWB has a small membership, but deep relationships with the people and groups who are involved. Many graduates of the programs offered by SWB and members of their partner organization are also members of SWB, including the board, staff, and volunteers.

Power Sharing
SWB’s annual general meeting is an important place for power sharing to happen. Having a board that is very diverse and that reflects all the iterations of SWB helps to keep power dynamics in check in a healthy way. Also important is having an online system whereby decisions are tracked, reports are filed, and where records are kept of what happens at the organizational level.

Guiding Principles
SWB has established the following four guiding principles:

- **Reflective**: spending time to allow things to reveal themselves. Allow insight and purpose to emerge slowly.
- **Innovative**: being flexible and open. Being malleable and responsive to a changing environment. Being open to being wrong and to always be ready to learn something new.
- **Supportive**: being compassionate and caring. Understanding how to put others first. Being able to collaborate more effectively because deep relationship can be seeded through mutual respect and support.
- **Evolving**: pushing ourselves to grow and adapt and to have growth be a goal that we’re collaboratively working toward – to always be growing and always be learning.

Tamarack Institute

Membership
The organization has 12,000 members called *thought leaders*, who have the strongest ideas that advance the thinking of the Tamarack Institute. These members are invited, and often others will recommend them. This operational model is a fairly extensive process over time, because the thought leaders need to be active in the learning community in order to be invited in. In terms of the learning community model, Tamarack has 3 areas of learning, which are operating as campaigns:

1. Vibrant Canada ([http://vibrantcanada.ca](http://vibrantcanada.ca))
2. Communities Collaborating for Change ([http://www.TamarackCCI.ca](http://www.TamarackCCI.ca))
3. Seeking Community (http://seekingcommunity.ca)

**Power Sharing**

One of the defining sectors that Tamarack is known for working in collaboration with is what they have termed the *fourth sector*. In all of the issues that the organization works on, people with *lived experience* are included. For instance if Tamarack is working on poverty, they work with people situated in the *fourth sector* – i.e. people who are living in poverty. As Paul Born asserts, “their voices need to be at the table. We do this on all issues, for example around crime, early childhood development, and all of the different issues that we work on” (Personal communication, president, May 1st, 2012).

**Santropol Roulant**

**Membership**

Santropol Roulant has an extremely diverse membership base in terms of life experience and capacity to participate. The intake process is dependant on what kind of member one is. Each participant sets the terms of how they want to participate; the organization wants people to feel good about themselves and their participation. This approach has proved to be very effective and beneficial in establishing the culture of the organization.

**Power Sharing**

Santropol Roulant aims to have maximum transparency in all of the work that the organization does. Every member is at the first level made aware, and secondly, everyone is given an opportunity to participate. There is a *culture of feedback* where discussion and dialogue is encouraged. Furthermore, power is shared by encouraging members to feel very comfortable having sometimes difficult conversations about power and as Chad Lubelsky says, “by being explicit in what we’re looking for and when we’re failing at it” (Personal communication, executive director, April 27th, 2012).

**Guiding Principles**

Santropol Roulant has 9 Core Principles of Engagement:

1. **People as gifts** - Each person who comes in contact with Santropol Roulant is seen as a whole person with many dimensions that, when given space to flourish, feed the organization’s vibrancy, capacity to innovate, and overall effectiveness.

2. **Relational productivity** - Creating the space and skills for healthy interpersonal and group communication are essential and highly productive aspects of organizational life.
3. **Comfort with change** - We embrace change and uncertainty as opportunities to learn and evolve. For a youth-run organization such as Santropol Roulant, staff and volunteer turnover are necessary and positive elements of our organizational rhythm.

4. **Cultivating individual learning and organizational creativity** - We value personal growth, curiosity and play as essential to Santropol Roulant’s dynamism and productivity.

5. **Collaborative leadership** - We strive to be deeply participatory, sharing decision-making and leadership in a way that contributes to everyone’s learning and growth while we deliver on our mission.

6. **The importance of space** - We pay attention to the state and arrangement of the physical space as it affects the way people relate to the organization and to each other.

7. **Gravitational structuring** – We invite people to involve themselves in the tasks, projects, conversations, and decisions that they are drawn to based on their own interests and curiosities.

8. **Coherence** - We aim to live our deepest values in all our relationships: with clients, staff, board members, volunteers, funders, partners, neighbours, etc.

9. **Community building** - We strive to become a living expression of the change we want to see in the world, rather than simply an instrument for that change.

The interview results above capture the mechanisms and strategies of some innovative organizations working at a national and international level. However, this is by no means a complete or comprehensive list of such organizations.

The section that follows provides a table capturing a list of organizations and literature recommended by participants to consult and examine for the purpose of future research in the area. Of interest, almost all interviewees suggested organizations that were already being interviewed, suggesting that the organizations profiled in this report are widely regarded as being innovative.
### TABLE 2: SUGGESTIONS OF ORGANIZATIONS TO EXAMINE IN FUTURE SCANS

<table>
<thead>
<tr>
<th>Suggested by:</th>
<th>Suggestions:</th>
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<tbody>
<tr>
<td><strong>McConnell Foundation</strong>&lt;br&gt;(John Cawley, director of Programs and Operations)</td>
<td>• Sports Matters Group (Chris Jones, Senior Leader)&lt;br&gt;• Framework Foundation (Anil Patel, Co-Founder and Executive Director)&lt;br&gt;• Santropol Roulant (Chad Lubelsky, Executive Director)&lt;br&gt;• Schools Without Borders (Chris Kang, Founder)</td>
</tr>
<tr>
<td><strong>Caledon Institute</strong>&lt;br&gt;(Anne Makhoul, Principle Project Officer)</td>
<td>• Tamarack (Paul Born, President or Liz Weaver&lt;br&gt;• BCAP (Business Community Anti-Poverty initiative) – Monica Chaperlin&lt;br&gt;• Hamilton Roundtable for Poverty Reduction (Tom Cooper, current Executive Director)</td>
</tr>
<tr>
<td><strong>Framework Foundation</strong>&lt;br&gt;(Anil Patel, Co-Founder and Executive Director)</td>
<td>• Schools Without Borders – moving into a model which uses technology to facilitate Sharing as a governance piece&lt;br&gt;• There are other models outside of this sector that we think are really driving the Sharing Imperative. Wikipedia is a great example, TedX, in the way that they’ve posted all of their stuff online so that people can view it for free.</td>
</tr>
<tr>
<td><strong>Suggested reading material:</strong></td>
<td>• ‘Here Comes Everybody’ by Clay Shirky&lt;br&gt;• ‘The Mesh’ by Lisa Gransky&lt;br&gt;• ‘The Power of the Pull’ by John Hagel</td>
</tr>
<tr>
<td><strong>Schools Without Borders</strong>&lt;br&gt;(Chris Kang, Founder and Executive Director)</td>
<td>• Framework Foundation&lt;br&gt;• Manifesto <a href="http://themanifesto.ca/">http://themanifesto.ca/</a>&lt;br&gt;• Dream Now <a href="http://www.dreamnow.org/">http://www.dreamnow.org/</a></td>
</tr>
<tr>
<td><strong>Santropol Roulant</strong>&lt;br&gt;(Chad Lubelsky, Executive Director)</td>
<td>• Framework Foundation – their philosophy of being complete transparent with all of their documents&lt;br&gt;• Engineers Without Borders – their work is somewhat analogous to us in that they have a youth leadership mandate and they do a lot of this work and at they same time they are delivering a service.</td>
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CONCLUSIONS

Based on the interview results described above, the following factors were identified as key facilitators to innovative practice.

→ The Value of Sharing. Building the principle of sharing directly into the governance model is a common approach to establishing and maintaining an innovative non-profit organization.

→ Valuing diversity. ‘Incorporating diversity’ emerged as a central theme in the interviews. Creating space in an organization to allow for divergent thinking to emerge organically and synergistically appears to be a critical part of growing the work. As succinctly articulated in an article published in the Stanford Social Innovation Review about the ‘design thinking’ approach, “[d]ivergent thinking is the route, not the obstacle, to innovation” (Brown and Wyatt, 2010, p. 1).

Welcoming and valuing divergent thinking and diversity within the structure of an organization is not only used as a way to co-generate innovative ideas; actively incorporating difference in terms of interests and experience within an organization’s membership base is a strategic way to share power and to maximize the impact of the work on the wider community. Having a diverse group of people involved in the work process appears to strengthen an organization’s resiliency. As Chris Kang asserts, this kind of supportive energy “despite difference” allows people “to collaborate more effectively because deep relationship can be seeded” (Personal communication, founder and executive director, April 24th, 2012). Valuing and incorporating the perspectives and feedback of the public into the work is an effective way to grow as an organization. Indeed, Anil Patel would suggest that this is in fact imperative. Creating channels to consistently incorporate community feedback is a way to demonstrate an organization’s commitment to positively impacting life in the broader community.
Furthermore, incorporating ways to promote multi-sectoral collaboration is a valuable way to maximize collective impact. One method for welcoming divergent thinking into the culture of an organization employed by the Vibrant Canada learning community at Tamarack Institute is to organize membership around an issue in a multi-sectoral leadership roundtable format. In this format, stakeholders from a variety of sectors, with potentially divergent approaches and interests, can collaborate around a shared goal in an effort to address a particular social issue. Not only can this multi-sectoral approach fortify an organization’s internal structure, moreover, this approach can enhance an organization’s ability to have a more significant impact on the community at large. From a collective impact perspective, “large-scale social change comes from better cross-sector coordination rather than from the isolated intervention of individual organizations” (Kania and Kramer, 2011, p. 1).

→ **Technological innovation.** Harnessing the power of the Internet can assist organizations in sharing the right information with the right people and can maximize the impact of the work that an organization does. Anil Patel calls this ‘curated sharing’ – i.e. getting the relevant information to the right people.

A mechanism that can facilitate cross-sector coordination and valuable networking is the Internet. The Internet provides a space for organization’s to share their work and information with other organizations, stakeholders, and the public. In this study, we see both Framework Foundation and Schools Without Borders adopting an approach that actively relies on the Internet to share information, and to invite the public to participate in the work through providing feedback and ‘tracking’ the work that the organization is doing online. Framework Foundation has in fact integrated the principle of sharing directly into the organization’s governance model, calling this approach to governance the *Sharing Imperative*. The trend towards sharing financial, operational, and programmatic information online, emerged as a dominant theme in the interviews, and represents an innovative way to approach governance, decision-making, power sharing and to broaden the membership base. Anil Patel of Framework Foundation cautions that, “organizations that are close-shop and don’t share or think they’re good at sharing but don’t actually build any of the capabilities, are going to be the ones that get into a lot of trouble” (Personal communication, April 20th, 2012).

→ **Positive Participation.** Organizing and expanding membership flexibly in order to allow participants to set the parameters of their own participation so that they feel positive about participating, appears to be a beneficial and effective approach to growing the work. This can also guard against volunteer burnout and donor fatigue.
Refined guiding principles. Clearly articulated guiding principles that express the core governance paradigm help to steer the work that members of the organization do, and to convey the value of the work to the broader community at large.

BROAD CONCLUSIONS

There are a host of both challenges and opportunities that people working in the non-profit sector confront on a daily basis in their efforts to respond to complex social issues. The insights shared in the interviews described above demonstrate the continuous commitment that members of social innovation and change-oriented organizations must make in order to remain effective in achieving their mandates and objectives. Innovative governance paradigms that emphasize ‘sharing’, ‘transparency’, and ‘collaboration’ appear to be central mechanisms that can support successful organizational operation and development. How this is actually achieved in a particular organization depends on the available expertise and time commitments provided by the various governing members. A culture of openness established within an organization through its guiding principles appears to be a significant component of what makes an organization ‘work’ successfully, both internally, and for the wider community.

Change-oriented, non-profit organizations are invaluable points of entry into developing meaningful solutions to complex social problems. Budd Hall asserts that non-governmental organizations are promoting a totally new vision of social development, and that the title “NGO” does not accurately capture the fullness of the character of many such organizations. Hall believes that these organizations “are the constructors of alternative structures of society…NGOs have occupied the space in many of their societies for creative and innovative social programming” (1989, p. 573).

The organizations consulted for this study are providing a space for people to come together and to communicate, collaborate, and coordinate their work in a shared endeavour to address a social issue. Paul Born asserts that, “once people are engaged and they begin to collaborate in an authentic way, in a deep way, new ideas begin to emerge”. Hopefully, this study will contribute to the emergence of new ideas, inspiration, and collaboration for the 10 Carden community.

LIMITATIONS OF THE REPORT
This report only includes information from seven Canadian non-profit organizations. In the future, besides consulting representatives from a greater number of organizations, it may be
advantageous to connect with organizations outside of Canada. Doing so would contribute perspective and insight that a study of this size and scope was unable to capture. Furthermore, a more comprehensive review of the scholarly and/or grey literature which pertains to this topic may be useful for certain members of the 10 Carden team, or may be a valuable reference document to make available to members or to the wider community online.

IMPLICATIONS OF THE FINDINGS
The findings may contribute directly to the work of 10 Carden as it grows and expands by learning from the insights shared by others working in a similar field within the non-profit sector. The 10 Carden team may learn from the work that other organizations have done and are doing to operate effectively and sustainably in the current ‘lean’ federal funding climate. The team may learn from mistakes that other organizations have made and have kindly shared for the purposes of this study. Furthermore, this research has established connections with the participating organizations and spread the word about the work that 10 Carden is doing. Establishing connections among organizations operating in the social sector is indeed valuable, especially from a collective impact perspective that sees coordination among multiple organizations and initiatives as imperative to affecting large-scale social change and addressing complex problems. The connections established throughout the process of this research can potentially be strengthened over time.

FUTURE CONSIDERATIONS
Based on the overwhelming emphasis placed on the importance of technology and the Internet as a communication tool among organizational members, stakeholders, and the wider community at large, 10 Carden may wish to consider consulting with the Framework Foundation to discuss strategies for transitioning more deeply to a ‘Sharing Imperative’ model similar to that outlined in the first table above. The notion raised by Anil Patel of ‘sharing’ as a core governance piece is already central to 10 Carden’s work/mandate, serving as it does as a shared space setting and community hub in downtown Guelph (http://www.10carden.ca/). Incorporating this method more actively into 10 Carden’s process may be something to consider for future organizational development purposes.
REFERENCES


APPENDICES

The following appendices include (i) the five interview transcripts from participating organizations, (ii) the request to participate in the study sent via email, and (iii) the interview guide, which is incorporated in the request to participate document.

APPENDIX A: FRAMEWORK FOUNDATION: ANIL PATEL (CO-FOUNDER AND EXECUTIVE DIRECTOR) INTERVIEW TRANSCRIPT - APRIL 20, 2012

Brief background information to provide context:

Anil Patel is the co-founder of Framework Foundation, the charity that runs Timeraiser (http://www.frameworkorg.org/timeraiser.html) and that has developed innovative ideas like Sharesies (http://www.frameworkorg.org/sharesies.html) and Civic Footprint (http://www.civicfootprint.ca/). Anil is shifting the approaches of both volunteers and volunteer/non-profit organizations to become a more efficient, interconnected and powerful system. Anil is showing that the philosophy of 'sharing by default' can be realized through technology, but only if embraced as ideology first. To date, Timeraiser events across Canada have generated 95,000 volunteer hours, engaged 6,500 Canadians to pick-up a cause, worked with 350+ agencies in need of skilled volunteers and invested $490,000 in the careers of Canadian artists. And the tools they are developing are making it easier to work in true collaboration with partners, funders and volunteers across the country (Information adapted from http://www.youtube.com/watch?v=PpoBqO2AJKU).

Can you tell me about how governance is structured in your organization?
Framework is focused on non-profit capacity building and mission delivery. We have a governance paradigm that we call Share by Default, or the Sharing Imperative – aka we’re always thinking about how to provide certain aspects of our goals and game plans online in real time that other people can not only see, but interact with. Framework coined this term, borrowing heavily from other industries that have recently witnessed massive levels of disruption because of the ‘sharing imperative’.

For example, Virgin music went out of business because of iTunes and Kodak went out of business because of high definition cameras on phones and how Blockbuster has gone out of business because of Hulu and Netflix – this is all about peoples’ expectations of getting what they want, when they want it on any internet enabled device – that’s the paradigm. So we were just trying to figure out over this year how this relates to nonprofit best practices. Because you can have a nonprofit which might be efficient but they’re not necessarily transparent or they could be transparent but not necessarily collaborative or they could be collaborative and not necessarily efficient. So in that sort of trifecta we’re living in, an era where sometimes organizations have to exhibit all of those three things at the exact same time – easy to do in
theory, pretty hard to do in practice, and what we’re trying to do is more of the testing and prototyping of what all of this looks like. We think that sharing be default is the single most important thing that non-profit and funders can do. In fact, it what inspired our ‘sharesies’ section on this website.

The Share by Default/Sharing Imperative approach has entirely impacted the culture of our organization and the way that we do our work. We’re all in charge of fundraising, we’re all in charge of customer service, and we’re all in charge of marketing. We know that getting information to places that people can see them online in real time is really critical so it completely changes the way that we work.

A section has been created on our site called ‘Sharesies’ which provides high-level thinking and what we’re putting together, including governance models. People can take a look at this at their leisure.

Taken from Framework website: (see http://www.frameworkorg.org/about-sharesies.html)

‘Sharesies’ is a management mind-set that gets us thinking about how well we share information internally with our staff/volunteers and externally with our stakeholders. By curating information thoughtfully, making it available online frees up time to have more thoughtful conversations with team members & stakeholders about important topics.

However, to do this well & do it often requires us to re-think how we curate relevant information in a timely fashion. Why:
• People are increasingly busy in their work/personal lives
• People are overwhelmed with email, user names/passwords & other information thrown their way
• People have expectations to get the information they want online and in real-time

With these observations in hand, we are re-thinking few things as it relates to skilled volunteerism in the knowledge economy:
• How has cloud, mobile, & social computing affected skilled volunteer engagement & retention?
• How is this engagement & retention affected as curated information is posted online & in-real time?
• How can we re-envision how smart people can contribute in meaningful ways?
Framework Foundation’s sister site is: http://planning.timeraiser.ca
This site contains a whole array of financial information, and reflects the Share by Default governance paradigm. Framework is the name of the charity that runs the Timeraiser.

Taken from the website, here is some background information to provide context: (see http://www.frameworkorg.org/timeraiser.html)

**What is it?**

Timeraiser is a silent art auction with a twist: Bid time, not money on works of art by local emerging artists. Timeraiser artists are paid fair market value for their work, thanks to our generous corporate partners.

We like to say that the Timeraiser is like speed-dating for volunteerism. The night of the Timeraiser, match your skills with the many agencies who are in the room - once you make a match, you're eligible to bid your time on artwork.

**What are we trying to accomplish?**

The Timeraiser connects people to causes and causes to people. We reach out to young professionals who are looking for ways to get involved, but aren't quite sure how. The Timeraiser brings together local agencies who are looking for skilled volunteers, while celebrating the work of artists in the community.

We aim to generate volunteer hours in the community while encouraging skilled volunteerism. We follow-up with each art winner to ensure pledge completion.

**Where are we headed?**

The Timeraiser is currently in 8 Canadian cities: Vancouver, Edmonton, Calgary, Winnipeg, Toronto, Hamilton, London and Ottawa. We plan to reach 10 cities by 2012 - including Montreal and Halifax.

Click here to view our Timeraiser Website and our current cities.

The following section demonstrates how things get done at Framework through the use of Timeraiser as a platform to maximize organizational transparency. This section also exemplifies decision-making processes, and how decisions are made in accordance with the governance model.

**Timeraiser Transparency: Reducing Administrative Burden**

(See http://planning.timeraiser.ca/rent-vs-buy.html). This is a link to an example of a rent-versus-buy analysis. This is a straightforward and simple thing to do. Now that we're doing more
Timeraiser events in Ontario and we typically rent our tables and chairs from vendors across the province, one of the questions we ask ourselves is should we, from a financial perspective, consider purchasing this material and bringing it with us from event to event? Again, a pretty unremarkable thing, typically done in a committee structure and a handful of people get on a conference call and discuss whether or not we should buy the material. But we turned it to our crowd - people who have been involved in our work in any form or fashion. So we send an email out to about 30-40 people and whoever in Canada was interested in providing comments or insight could do so. So as you’ll see, from the rent vs. buy analysis when you scroll down from the actual dollars and cents you’ll see the comments that people were providing. And this is permanent record. It’s not like we take this down or that it’s only a handful of people who see it – everyone can see it [transparency imperative fundamental to how they do they work and how governance is organized].

http://planning.timeraiser.ca/toronto-plan.html - this link exemplifies how anyone can take a look at the cost associated with running any of the events. Its easy for our team to input information onto this site, to maintain over time, and it is mobile friendly so anyone can actually look at this information on any internet-enabled device. This raises the bar of trust and transparency with our partners. This example demonstrates our governance model – it is that open-sourced, power of the crowd, whoever is interested can come in and take a look and comment one way or the other.

http://www.timeraiser.ca/timeraiser-sroi.html - this link exemplifies how we’ve also decided to completely share our theory of change, and what our social return on investment model is. We still have a bit of work to get this finalized but what we’ve tried to at least do is provide as much transparency about how we’re measuring the tangible and intangible results and then all of the time and effort that it takes us to do this. So we can actually say with a good deal of precision – however anyone can then go ahead and dispute this and criticize it and say ‘well I think you’re underestimating’ or ‘you’re overestimating’. So we’re opening that up – it’s not just our community saying ‘well no, we think our social return on investment is this’, or ‘for every dollar invested we generate $2 in social good’. Instead, we are completely open to healthy discussion.

Timeraiser Statistics: Demonstrating Effective Results
(See http://www.timeraiser.ca/timeraiser-statistics.html - this link demonstrates impacts and outcomes of the work)

(See http://www.timeraiser.ca/social-procurement.html) – this link exemplifies Timeraiser's social procurement strategy. Because we’re spending less time upfront on planning events (i.e. sorting out questions such as, where do we spend money, who is the vendor, and other administrative drags on the organization), it allows us to do what you see in our social procurement strategy. Quite a few years ago we made a very deliberate decision as a group that if we were able to raise precious dollars that we want to align these dollars with other selected organizations, especially social enterprises. We asked ourselves, ‘are we spending our
money to the non-profit equivalent of a double bottom line? This report here [see above link] makes it really easy for anyone to see how we’re doing it. Soon we will be releasing a link on our site so that the public can see our actual invoices, so it’s like “don’t take our word for it that we said we spent such and such an amount”. Instead, anyone can go and do the math. So all of a sudden it’s this old adage that if ‘knowledge is power’, then we’re decentralizing the knowledge in our organization and making it more accessible to more people and in doing so asking questions about what the public thinks of this or that idea, and not assuming that it’s just a handful of people who may sit on our board who are the ultimate gatekeepers for a good decision or a bad decision.

More on Governance: Imperative to Share proposals & other important pieces of information

(See http://www.frameworkorg.org/20-governance-model.html) - this link to our governance model is currently being updated! But the focus is on sharing as a central governance piece that directs the work done in and through Framework Foundation.

(See http://www.frameworkorg.org/foundation-of-greater-montreal.html) - this link demonstrates that we’ve also created a section on our website where all of our major proposals to public bodies are made available. This link provides an example of how we open-source all of our grants before the deadline is closing so that funding bodies can take a look and comment and tell us what is good and bad. We want to hear it all, and we include everything.

(See http://www.frameworkorg.org/otf-grant-9980580.html) – this link demonstrates that we also include reports online for the public to access. We’re the first OTF (Ontario Trillium Foundation) grantee to put our final report online – we thought that it was very important that if we got a successful province-wide grant that it was important to share it more easily with our community at large.

How do decisions get made as an organization? Is there a chain of command?
We have a very flat organization. For instance, all our job descriptions state that all staff members are responsible for marketing, customer service, fundraising, volunteer engagement, etc., on top of their specific duties. We do have a goal of making quick, informed and thoughtful decisions that are transparent to our community online and in-real time.

Is power shared? If so, how?
If there is any truth to the adage ‘knowledge is power’, then we are working to turn our knowledge inside out, making it available online and in-real time. We do this by making more of our financial, operational and programmatic information available online and in-real time.

What about membership? How is this organized? Is there an intake process?
We have 5 staff & 250 volunteers - 50 of which are engaged throughout the year.
The 50 members are already highly active in the community already and we recognize that because they continue to be asked to donate their time or money to a variety of different causes, they are facing volunteer burnout and donor fatigue. The cycle just repeats itself when governance models for nonprofits and do-good organizations are all about ‘it’s our mission’ and ‘how we work’ or in theory ‘we like to collaborate from time to time’ but when it's not really embedded in the DNA, then that's what leads to the increasing fatigue. So what these members recognized in the approach we’ve come up with is that this provides a whole different way for non-profits to ask citizens for their time and talent.

We’ve really gone with a ‘pick a menu of ways to get involved with us’ approach [central theme] as an intake process. Different members across the country can be involved this way, which is one benefit of this approach. So members can pick off a menu. We will list ten high-level governance things and explicitly state that we need board members to consider doing five of the ten and help us do that, as opposed to telling board members that they have to do this, and then it’s a little bit more of asking members to write their own journey or participate based on their expertise and interests. So it takes a bit of time to go back and forth on that type of stuff but it’s been hugely important to provide the type of governance model that we’re proposing. This model is really going to dominate the non-profit sector in years to come. Sharing is the future, and organizations that get it right are going to do well, while those that are close-shop and don’t share or think they’re good at sharing but don’t actually build any of the capabilities, are going to be the ones that get into a lot of trouble.

**Guiding principles that underpin your work as an organization:**
(Slides provided care of Anil Patel).
The Sharing Imperative – core principle:

In 2008, there were more devices connected to the Internet than there were people on the planet. And in 2015, futurists are predicting that there is going to be anywhere from 50-75 billion devices connected to the Internet – so anywhere from 12-15 devices more than people on the planet that are GPS’s on taxis or smart water meters or Internet enabled phones. We’re seeing that the expectation of getting what you want when you want it on any internet enabled device is the real key; But what people are really striving for is ‘curated sharing’ – i.e. the relevant information to the right people. So this drives our governance model and way of thinking around our new ways of sharing – online, in realtime, and anywhere – and then what are the new waves that are powering that? So it’s all of the new cloud mobile and social tools that just didn’t exist in some cases even 3-5 years ago. So then if that’s the backdrop, the cultural backdrop, sharing as a governance question – it’s engaging the internal capabilities of our team to be always thinking about what we need to share with our stakeholders and as our stakeholder mix changes, how do we think about always re-envisioning what that looks like? So then it’s a very, very thoughtful approach to which pieces of financial, operational, and programmatic stuff go online.

The third layer is around things that are very predictable. You guys [at 10 Carden] have certain goals and game plans at the shared space in Guelph and we [Framework] have some very
specific and predictable activities with our Timeraiser that are easy to get on paper and easy to share. But then it’s the harder stuff on impact – people who come to our Timeraiser events, how many of them get involved and stay involved – how much attribution can we secure – that becomes harder. But at least if we’re reducing the amount of time we’re spending reporting on activities, the more time we can spend reporting on impact.

This basically drives our whole concept of ‘sharing’ as a governance question.

What organizations do you see as innovative or models in your field?

Suggested organizations:

- ‘Schools Without Borders’ is moving into this type of model as well – we’re working closely with them about how to lay the groundwork. It’s typically younger organizations who are all about this method.
- There are other models outside of this sector that we think are really driving this. Wikipedia is a great example, TedX, in the way that they’ve posted all of their stuff online so that people can view it for free.
- Examples where providing people with access to get involved with content is what really interests us. So we’ll just scan wherever this is happening elsewhere and try to determine how to invent that in our work.

Suggested Reading Material:

- ‘Here Comes Everybody’ by Clay Shirky
- ‘The Mesh’ by Lisa Gransky
- ‘The Power of the Pull’ by John Hagel
- [http://www.frameworkorg.org/convergence.html](http://www.frameworkorg.org/convergence.html)
Can you tell me about how governance is structured in your organization? Includes information about decision-making processes:

Schools Without Borders (SWB) is going through a lot of transitions right now, so I can talk about one of the things we’ve experimented with and where we are today.

We definitely experimented with trying to have a more, what we thought was, an inclusive and integrated decision-making process with a lot of the people from our partner organizations and community participating in decision-making processes. So we had a *circular, or inside-out model*, whereby we opened up our board meetings to staff and members, and we had these working committees and took a decision-making by consensus approach in our organization. But all of this proved to be very labour intensive and a lot of focus had to be paid to just managing relationships. So after we saw this approach bogging down we have been recently transitioning to more of a flexible system where we’re trying to have one source of information and one record of everything that we’re working on so that there’s not duplication and people can step in and out where it makes sense for them. And we’re doing a lot of this with *technology* – so trying to move onto the cloud computing platform [For more on this see: http://www.mcconnellfoundation.ca/en/resources/multimedia/video/chris-kang-schools-without-borders-a-brief-overview-of-schools-w] to store all of our files and decision-making and to track what items and issues should be made available to the public through this technological platform. So we’re right in the middle of this transition currently. We felt that this transition was necessary to deal with the realities of how organizations exist today and of how busy people are, but finding the sweet spot for volunteers to be able to use their time effectively and see things working productively.

We’re also in the process now of evolving the way that we work into finding a volunteer model that works so that we have less overhead and less paid staff. So this is all a process to make these changes. And in this, board members need to be selected appropriately and have a certain skill set – there needs to be a certain level of literacy, or knowledge, or time that they can give to the work. They need to have both the skills and the *time*. So again, this has definitely been a process and it’s really difficult to implement innovative governance models, and you really need to have a dedicated core group that are committed to that – you need at least two or three people for it to survive but you need four to six people for it to grow. So there are a lot of moving pieces to it.
How is membership organized? Includes information about how power is shared within the organization and how decisions are made.

Currently we have a small membership, so we’re an example of an organization that is not very large in terms of numbers and membership, but we have deep relationships with the people and groups who are involved. A lot of the graduates of our programs and our partners are members of SWB, including the staff and the volunteers and the board. Our annual general meetings (AGMs) were a big place for power sharing to happen, and because our members are also participants themselves, coming in and out of the program and based on the feedback we’re getting from them, power is something that we share a lot of. We have a lot of former participants on our board as well. So we made it a point to make sure that we had very good representation on the board – so this has been a huge way to balance power, and has helped us to deal with the fact that I might have a very strong personality and have a very clear vision of how I’d like to see things and I’m also the founder of this organization, so this brings with it all it’s challenges but to have a board that is very diverse and reflects all the iterations of SWB helps to keep power dynamics in check in a healthy way. Also, by having an online system whereby decisions are tracked and reports are filed and there’s a record of what happens at the organizational level is also really important so that there is visibility and transparency in terms of where you came from and where you’re going.

There are a lot of pieces that go into sharing power and making decisions that take into account multiple perspectives. This just needs to be a priority and then often times you will figure out ways to create the systems and the relationships needed to uphold what you think is important, whether it be balancing power, or if it’s transparency, if it’s effective communication or better decision-making. We’ve also done a lot of consulting engagement with groups like Deloitte (http://www.deloitte.com/) and other partners like Framework Foundation (http://www.frameworkorg.org/).

We also have a pretty good idea of where our gaps are as an organization and what needs to be addressed [central theme – know weaknesses]. We also try and pick one or two or maximum three things that we focus on as an organization in terms of organizational development and growth.

Guiding Principles:

Reflective, Innovative, Supportive, and Evolving. With these key principles we’re talking about:
- **Reflective**: spending time to allow things to reveal themselves, so being reflective and introverted to allow insight and purpose to emerge slowly.

- **Innovative**: being flexible and open. Really putting yourself in a position where you can be malleable and react to a changing environment where you enable yourself to be challenged and to be wrong and to always be ready to learn something new.

- **Supportive**: this is really about having understanding and compassion and care, and also understanding how to put others first and as a result of support, being able to collaborate more effectively because deep relationship can be seeded.

- **Evolving**: really pushing ourselves to grow and adapt and to have growth be a goal that we’re collaboratively working toward – to always be growing and always be learning.

**What organizations do you see as innovative or models in your field?**

- Manifesto [http://themanifesto.ca/](http://themanifesto.ca/)
Can you tell me about how governance is structured in your organization? There is a difference between our formal structure and formal ways of working on paper versus informal way that we organize governance.

Formally our governance structure is a classic structure, in that we have members who elect a board of directors, and the board of directors hires the executive director and then the executive director manages and supervises the staff.

And within the staff team there is two levels of hierarchy: the executive director, and the rest of the membership are at the top of our organizational hierarchy.

In practice, we struggle – the idea that the members are at the top of our organizational hierarchy I don't think paints an accurate picture of our work. Members vote for our board of directors and inform our decision-making on an informal basis, because our members are our donors and our clients and our volunteers and so they influence our work in lots of different ways. But at our AGM for example, there isn’t a lot of discussions around policies and organizational directions and stuff like that. That happens much more at the staff level, and little bit on the board level as well.

I don’t want to misrepresent the work that we do by saying that it is definitely the members at the top and everything falls from there because that's not quite the case.

We have a youth leadership mandate in our organization. And this is always a challenge for us. Every day we have a service to deliver [food delivery to ‘vulnerable’ / ‘isolated’ / ‘marginalized’ members of the community] and then there is also this youth engagement and leadership that we’re doing at the same time. So how do you balance those two and when do you need to focus on one? This is a question we juggle.

How do decisions get made as an organization? (Is there a chain of command?)
In the day to day in terms of how we work, there are 12 full-time and 3 part-time staff members and you might get different opinions depending on who you ask but I would say that most of them have a high degree of autonomy in their work. We have weekly meeting of the whole staff on Thursdays where the staff put together the agenda of the week through a collaborative process and different people facilitate that. The point of those meetings is to update our work and any kind of organizational decision or programmatic decision is brought to the team. So we talk about what we’re working on and everyone has an opportunity to have input and then either we make a decision or we might need to go back and do more work and then that would come back and a decision would be made on it.

There are essentially two major groups: We have over 100 volunteers who come through here every week and so they execute a lot of the work that we do, but the staff make things run.

Is power shared? If so, how?
One of the ways that we share power is that we try to have maximum transparency in all of the work that we do. So everybody is at the first level aware, and secondly, everyone is given an opportunity to participate. But we’re also very clear about whose responsibility it is to move things forward. And so we’re always kind of figuring out that balance and it will shift a bit and our work has changed in the last few years and we have grown so we don’t always get that balance right, but there is a culture of feedback so when something is off, we’re quite quick to talk about it and to say it. And so one of the ways that we share power is by trying to create a culture where we’re very comfortable having sometimes some difficult conversations around it [power] and being explicit in what we’re looking for and when we’re failing at it.

What about membership? How is this organized? Is there an intake process?
Our membership base is extremely diverse in terms of life experience but also in terms of capacity to participate. Many of our members live with reduced autonomy – so how do we work in service of them and how do they inform our work, when they struggle greatly to participate in any of our activities?

So that’s another slice of a challenge that we work with.

More about membership… Is there an intake process?
Intake process is dependant on what kind of member one is.
The way volunteers work is that we invite volunteers to come to a volunteer orientation session and all volunteers need to do that before they volunteer and we have those once every two weeks.

The work that we do in line with one of our principles of engagement is that we’re very ‘invitational’ in nature; there is the invitation to participate and then there is the invitation to deepen your participation. So inside our office we have volunteer signup sheets and people are asked to sign up and to do so as they wish and there is also an element of trust. We don’t call back. If you say as volunteers that you’re going to do it, we believe that you are going to do it.

One of the things that has been key to our success and especially if you’re looking at work that has to do with youth engagement and leadership and things like that is that it is very easy to get involved in our work because our schedule is flexible, in that there is lots of different ways to get involved. We have different shifts at different times of day and there are different things that you can do. So it’s a very sort of time-limited engagement, so you can come and cook a meal between 9:30 and 12:30 for example, and sometimes it can be a longer-term project. So you can set the terms that align with how you want to participate. And this approach has proved to be very beneficial and effective. So this is one aspect of our membership in terms of our volunteers.

Our clients, where people live with the loss of autonomy, are referred to us by the healthcare system. We receive calls from social workers from community health centers and refer clients.

Funders are members of our organization by giving us money.

Staff are also members by virtue of being staff.

Another insight in thinking about our membership…We deliver a service, and there’s an important aspect of our service delivery: we use food delivery as a vehicle for social change – and the idea is really to create community. And when we talk about how people participate, it’s really the idea of people setting the tone for their participation. This is very key to us. And we think one of the ways to do that effectively is by helping people to feel good about themselves and their participation. And so for us there is an element of choice which trickles into all aspects of our work. And especially when you are delivering food. Because food involves choices that we make every day, multiple times a day. And when that choice is taken away from us and we feel that we don’t have any choice, it’s difficult to feel good about oneself and consequently it’s
very difficult, we think, to envision how we’re going to participate in community and be a productive and contributing member. So how this trickles down for us is that we try and provide our clients with as much choice over food as we can. So all our clients receive a calendar which details all of the meals we offer for the next year and they can say to us that they don’t like a particular meal and would like to substitute it for another meal, or if they would like to substitute ingredients if they have dietary preferences. For example, if someone doesn’t like tomatoes and they are told they have to eat tomatoes, people are made to feel like a child. And so what we’re trying to do is take that out, and to restore people’s aspect of autonomy, and really dignity. And we bring this principle into all aspects of our work in different ways depending on which segment of our membership that we’re working with.

Can you name some guiding principles that underpin your work as an organization?
We have 9 core principles of engagement that underpin how we work:

Santropol Roulant’s

Core Principles of Engagement

1. **People as gifts** - Each person who comes in contact with Santropol Roulant is seen as a whole person with many dimensions that, when given space to flourish, feed the organization’s vibrancy, capacity to innovate, and overall effectiveness.

2. **Relational productivity** - Creating the space and skills for healthy interpersonal and group communication are essential and highly productive aspects of organizational life.

3. **Comfort with change** - We embrace change and uncertainty as opportunities to learn and evolve. For a youth-run organization such as Santropol Roulant, staff and volunteer turnover are necessary and positive elements of our organizational rhythm.

4. **Cultivating individual learning and organizational creativity** - We value personal growth, curiosity and play as essential to Santropol Roulant’s dynamism and productivity.

5. **Collaborative leadership** - We strive to be deeply participatory, sharing decision-making and leadership in a way that contributes to everyone’s learning and growth while we deliver on our mission.

6. **The importance of space** - We pay attention to the state and arrangement of the physical space as it affects the way people relate to the organization and to each other.
7. **Gravitational structuring** – We invite people to involve themselves in the tasks, projects, conversations, and decisions that they are drawn to based on their own interests and curiosities.

8. **Coherence** - We aim to live our deepest values in all our relationships: with clients, staff, board members, volunteers, funders, partners, neighbours, etc.

9. **Community building** - We strive to become a living expression of the change we want to see in the world, rather than simply an instrument for that change.

**What organizations do you see as innovative or models in your field?**

- Framework Foundation – their philosophy of being complete transparent with all of their documents

- Engineers Without Borders – their work is somewhat analogous to us in that they have a youth leadership mandate and they do a lot of this work and at they same time they are delivering a service.
Can you tell me about how governance is structured in your organization?  
Tamarack is founded around the principle of building ‘learning communities’ for social change. We’re a charity – we have a board of directors and it’s very traditional. As the president, I report to them. But we also have 30 associates who form as a steering committee around the actual work, or what I would consider, the governance of ideas for Tamarack. The board doesn’t deal with that – they just purely deal with fiduciary responsibilities, making sure that due diligence is covered as a board.

**The Tamarack Methodology:** What we do is, we believe that in order for systemic change to occur around a social issue (we call it systemic change or changing complex issues) that first and foremost citizens need to be engaged. And that takes times. And what we advance is a method of community conversation that allows citizens to become engaged in an issue over time. Once we have enough scale of engagement, when enough people are engaged, then what we can do is formalize a network. With this formalized network, we can develop a governance structure that develops a community plan that is co-owned by that network. And then they work using collaborative leadership principles to implement that plan. The collaborative leadership principles, through deep engagement, cause a new level of innovation around an issue. Once people are engaged and they begin to collaborate in an authentic way, in a deep way, new ideas begin to emerge [emergent properties – central theme]. I’ve always been a believer that it’s not an idea that matters, it’s the ability to implement an idea at scale that matters.

**How is membership organized? Is there an intake process?**
We have about 12,000 members – these would be the ones that are what we call thought leaders, the ones who have the strongest ideas that advance the thinking of the Tamarack Institute. We invite them in. Often, they will recommend others. This is how we operate. It is a fairly extensive process over time, because they need to be active in the learning community in order to be invited in.

In terms of the learning community model, we have three areas of learning:

3. Seeking Community (http://seekingcommunity.ca/)

We operate each one of these learning communities as campaigns.

**Vibrant Canada** is seeking to reduce poverty in Canada. Already we’ve worked in 13 cities and we’re now organizing 100 cities. There are already 42 that operate using the Tamarack Methodology. So Vibrant Canada is a learning community about reducing poverty in Canada using what all these cities have in common, which is a comprehensive poverty reduction strategy administered and managed by a multi-sectoral leadership roundtable. Vibrant Communities has reduced poverty now for over 2,200 families and it did this by implementing 232 community innovations. It has changed 58 government policies, all at the local level, in local communities across the countries. And it’s engaged nearly 4,000 people, 800 of which were new leaders out of the poverty sector. There are also over 700 corporations involved, along with citizen engagement. And this was just in our experiment with our 13 cities. Most people understand that there is *proof of concept* here.

**Communities Collaborating for Change** is our alumni community where we advance the three issues of: i) citizen engagement ii) collaborative leadership and iii) community innovation.

**Seeking Community** is attempting to open up very broad conversations about the importance of community in people’s lives and getting them to talk about how they might deepen their experience of community. This is a national dialogue. Our concern is that when people don’t have an experience of community, then it’s very difficult for them to care about their community. If they don’t care about family or their church or their neighbours, then to have them care about poverty in their town in very difficult. So we believe that we need to get people to care about community as a route to being able to engage them in social change.

There is a lot of overlap between these three learning communities. There are a lot of levels in terms of intensity of involvement. The two most active learning communities in terms of membership size right now are the ‘Communities Collaborating for Change’ and ‘Seeking Community’ ones. The ‘Vibrant Canada’ one has a restricted membership just in how it approaches itself. It’s by far the most active, but it has the least amount of members.

**Q:** How have you grown your membership base to 12,000 members?

**A:** These are people who subscribe to our work, the subscribers to ‘Engage’, which is our professional journal, or they attend our learning events. We run about 25 learning events per
year. 18 of those are virtual, and then this year we’ll do 11 face-to-face events, plus we’ll do about another 30 events that we call ‘custom events’. So this totals almost 50 events this year. These events occur in Canada, and the United States, and we’ve been doing some work in the last two years in both New Zealand and Australia. We have a large partnership in New Zealand. They often send mostly people here to learn with us, but we have been going there as well.

These members are people who sign up for the things that we do and stay involved with us over time. In many ways, what’s important to recognize, is that on average, we have 1 million visitors to our website every quarter. So we’ll have almost 5 million visitors to our website this year, and they will download well over 1 million documents. So that’s our learning community. And just in our tele-learning alone, we will have nearly 3,000 people attending those. We have a lot of activity now. I would say that just about everything that we do fills to capacity quickly. So this is how we look at our membership.

Guiding Principles underpinning your work:
There are two sets of principles:

First set: The one set of principles relates to how we look at the work itself. And so what we say about the work itself is that there are five principles. This set of principles is what we teach when we go into communities:

1) We look for bold outcomes. We want people to consider and have an understanding of the outcome of their work. So when we talk about a measure, we often talk about wanting to reduce poverty, we don’t just want to alleviate it.

2) Comprehensive thinking in action. We want to work comprehensively at everything that we do. We want communities to work comprehensively. That means to understand that everything is connected, and everything has to change at the same time in order for anything to change sustainably.

3) We believe in an asset orientation. When we come into a community, we want to think about what’s working; we want to think about what the community already has going for it, rather than looking at what the problem is that needs to be solved.

4) We believe in multi-sector collaboration. In other words, that sustainable change requires all sectors to work together. One of the defining sectors that Tamarack is known for working in
collaboration with is, is what we call the *fourth sector*. We include in all of the issues that we work on, people with *lived experience*. So if we’re working on poverty, we want to work with people situated in what we call the *fourth sector*—people who are living in poverty. Their voices need to be at the table. We do this on all issues, for example around crime, early childhood development, and all of the different issues that we work on.

5) **Learning and Change.** All change is evolving and it comes through a system learning together. You change things when people learn together and work together. And when they work together they learn more together and when they learn together the more they’re going to want to do together [feedback loop]. And that process of learning and changing is where the system is impacted.

**Second principle underpinning the work:** Tamarack is organized around what we call a *theory of change*. This principle in our theory of change is that *learning happens best in community*. This is why we focus on ‘learning communities’. Our understanding is that if we bring people together around an issue or an idea and they learn together, large-scale change is possible. And so *Tamarack is founded around the principle of building learning communities for social change*.

**What organizations do you see as innovative or models in your field?**

- Social Innovation Generation (SiG) – ask for Tim Draimian (Executive Director)
  http://sigeneration.ca/
- Planned Lifetime Advocacy Network (PLAN Institute) – ask for Al Etmanski (President and co-founder) http://institute.plan.ca/
- also see Al Etmanski’s popular blog: http://www.aletmanski.com/
- Social Capital Partners – ask for Bill Young (founder)
  http://www.socialcapitalpartners.ca/
- Another network: Ashoka Canada (44 Ashoka leaders would also be really interesting to look at) http://canada.ashoka.org/
APPENDIX E: DODEM KANONHSA: AMY DESJARLAIS (MANAGER) INTERVIEW TRANSCRIPT – APRIL 11, 2012

The governance structure is a partnership. The manager, Amy Desjarlais’ position is managed by two supervisors; one from Aboriginal Affairs and Northern Development Canada (AANDC) and the executive director from the Native Canadian Centre of Toronto (Native Centre). The AANDC supervisor oversees things like budget and programming, and the executive director does all of the administrative work for the programs.

Decision-making processes: we have a set of policies and guidelines that were set out previous to Amy’s tenure as manager, which steers the work. Any new decisions or programming go through the advisory committee made up of AANDC and Native Centre employees, and goes directly through the two supervisors as well.

The Native Centre is instrumental in how Dodem Kanosha is organized, because they are the organization’s connection to the wider Aboriginal community.

Decision-making is more hierarchical – it is not based on a First Nations structure. It is not a circle structure. It is Amy as manager, her supervisors, and then the advisory committee, so that is the hierarchy. Amy involves the wider Aboriginal community through feedback. As a manager, Amy frequently asks the members of the wider community who are connected to Dodem Kanosha’s contact list what they want to see, and they have clear communication with Amy what they want to see in the programming.

But this was something that was Amy’s decision – it wasn’t in place in the policies.
APPENDIX F: REQUEST TO PARTICIPATE IN THE STUDY AND INTERVIEW GUIDE

(This guide includes the questions in the request to participate)

Hello there,

My name is Clare Morgan and I’m a graduate student intern at the Research Shop at the University of Guelph working with 10 Carden, a space-sharing organization located in downtown Guelph, which is a gathering place and an incubator for researchers, organizations and entrepreneurs driven by their passion for social change.

I’m conducting a series of informational interviews on how organizations work in innovative ways with governance, membership, decision-making and power sharing. You are one of the organizations I am looking at because of your innovative work, and thanks to [name of recommender] recommendation.

We are looking for your expertise based on your experience at [name of organization]. The answer you provide will be used to help inform the work of 10 Carden. I am wondering if a representative from your organization would be available and willing to speak with me via telephone. The interview will take about 2-5 minutes of your time.

I’m interested in learning about how you do what you do as an organization. Here is the list of questions I would like to ask:

· Can you tell me about how governance is structured in your organization?
· How do decisions get made as an organization? (Is there a chain of command?)
· Is power shared? If so, how?
· What about membership? How is this organized? Is there an intake process?
· Can you name some guiding principles that underpin your work as an organization?
· What organizations do you see as innovative or models in your field?

Are you able to speak with me regarding this? If so, please let me know what is a convenient time for you to talk. Please feel free to contact me with any further questions or queries.

Kindly,

[Your name and signature]