CANADIAN FORUM for SOCIAL INNOVATION 2024

A ROADMAP FOR CANADA'S INNOVATION ECOSYSTEM

WORKBOOK

Vision & Backcasting Workshop #2

APRIL 26 2024, OTTAWA/WAKEFIELD

TABLE OF CONTENTS

CANADIAN FORUM for SOCIAL INNOVATION
FORUM CANADIEN pour l'INNOVATION SOCIALE

WORKSHOP HOSTS (Ottawa/Wakefield)

the COLLABORATIVE
yourcollaborative.org

McMaster University

ADVISORY COMMITTEE

Michelle Baldwin, Senior Advisor for Transformation at Community Foundations of Canada; **Karen Benzies**, Professor and Director Social Innovation at the University of Calgary, **Patrick Dubé**, co-Founder at Transition Bridges, **Mehrdad Hariri**, CEO Canadian Science Policy Centre, **Marie-Claude Lagacé**, Director of Social Innovation at Conseil de l'innovation du Québec, **Elicia Maine**, Associate Vice-President Research for Knowledge Mobilisation and Innovation at Simon Fraser University, **Andrea Nemtin**, CEO at Social Innovation Canada, **Naomi Nichols**, Professor and Canada Research Chair in Community-Partnered Social Justice at Trent University, **Sandra Schillo**, Founder at I²Hub and Associate Professor at the University of Ottawa, **James Stauch**, Director of the Institute for Community Prosperity at Mount Royal University, **Marie-Christine Therrien**, Professor, École nationale d'administration publique and Director, Cité-ID Living Lab, **Michael Toye**, Chair of the Social Innovation Advisory Council at Employment and Social Development Canadal, **Robin Wisener**, Ottawa, **Rahina Zarma**, Senior Policy Advisor at Mitacs.

FORUM PARTNERS

Agenda 26 April 2024

9:00	Land Acknowledgement, Welcome, and Introduction
9:30-10:00	Vision
10:00-11:15	Goals and Milestones Round 1 (breakout)
	Break
11:30-12:15	Goals and Milestones Round 2 (breakout)
12:15-12:45	Challenges
12::45-13:00	Final Remarks
13:00-15:00	Working and Networking Lunch at *La Muse* Restaurant

Participants

Annie Barette, Director of Policy and External Relations at Universities Canada
Brandon Meawasige, Director of Communications at Indspire
Christine Lauzon-Foley, Senior Director of Policy at the United Way Ontario East
Cody McKay, Science and Technology Policy Adviser, ISED
Danya Pastuczek, co-CEO of the Tamarack Institute
David Watters, CEO at Global Advantage
Elena Valenzuela, Director of the Official Languages and Bilingualism Institute at the University of Ottawa
Ian Wereley, Executive Director, CAGS
Jason Pearman, Director of YESS, ESDC
Jean-Francois Dionne, Director Science and Technology Policy, ISED
Jean-Noé Landry, Lead, Climate Data Hub, Concordia University
Jeff Kinder, Research Director at Council of Canadian Academies
Jessie Cooke, Government Relations Officer, Universities Canada
Marc Fortin, Vice-President of the Research Grants and Scholarships
Marianne Mader, CEO of Canadian Association of Science Centres
Michael Rowell, Director of Policy at U15
Nicolas Parker, Policy Analyst at Canada Foundation for Innovation
Pamela Ponic, Special Advisor, G&C Modernization at PHAC
Patrick Dubé, Co- Steward at Transition Bridges
Peter Andree, Director of the Carleton Centre for Community Innovation
Rhonda Moore, Director of Science Policy at the Institute on Governance
Robin Wisener, ESDC (private capacity)
Sandra Schillo, CEO of I^{2}Hub and Professor at the University of Ottawa
Sukhvinder Obhi, Vice-President Society and Impact at McMaster University
Sylvie Lamoureux, Vice-President Research at SSHRC
Tijs Creuzberg, CEO of Canadian Council of the Academies
Tim Wilson, Associate VP, Research at SSHRC.

Moderator

Sandra Lapointe, Director of The/La Collaborative, Lead of the McMaster Social Innovation Ideas and Action Lab and co-host of the Canadian Forum for Social Innovation

Facilitators

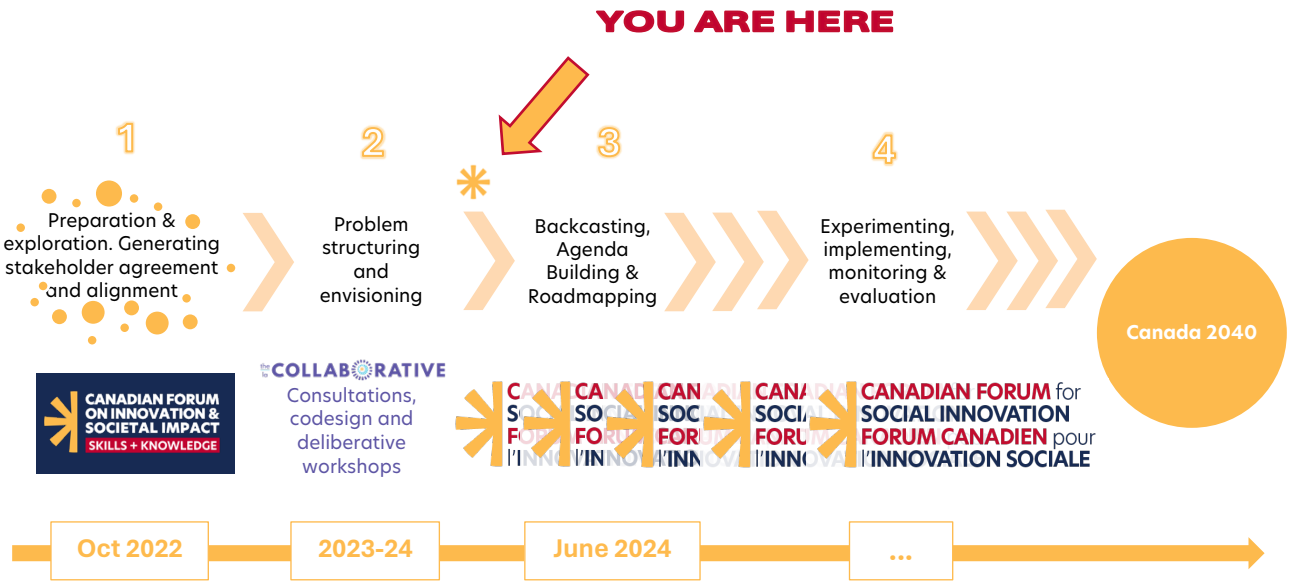
Akacia Propst, PhD Candidate at McMaster University
Marie-Hélène B. Hardy, PhD Candidate at McMaster University

VISIONING AND BACKCASTING PROCESS

On 12-13 October 2022, 125 stakeholders from higher education, the social sector, the municipal sector, national policy, and community nonprofits met at McMaster University for a series of catalyst roundtables, deliberative dialogues, and concertation workshops. The purpose was to determine zones of agreement and explore key actions for the purpose of creating alignment on policies and practices that leverage impact-first training and knowledge mobilization to build capacity for innovation in the social and municipal sectors. The results were shared in the form of a Consensus Report.

Building on this emerging consensus, over the last couple of years with the support o our team at The/La Collaborative, the Canadian Forum for Social Innovation collected a wealth of additional evidence (focus groups, sense-making, literature review, surveys, inventories) to articulate the challenge.

With the support of valued partners, the guidance of its advisory committee, and the stewardship of McMaster University's Social Innovation and Action Lab, the Canadian Forum for Social Innovation is now gearing up for the third phase of the project: a national dialogue that will leverage prospective co-design and backcasting methodologies to generate a Roadmap for Canada's Innovation Ecosystem. Four workshops will take place in April and May 2024 in Toronto, Ottawa, Montréal and Calgary, and the exercise will culminate with the second edition of the Canadian Forum for Social Innovation in Montréal on 11-12 June 2024.



This WORKBOOK presents a vision, goals, and milestones that emerge from the evidence we have gathered so far. The pre-Forum deliberative workshops in Toronto, Ottawa/Wakefield, Montréal, and Calgary will leverage your input to finalise problem structuration and vision building (step 2). They will also help fine-tune the proposed milestones that will be used to set the agenda (step 3), i.e. create the roadmap for Canada's innovation ecosystem at the Forum in Montreal on 11-12 June. As with all work in the social innovation space, the codesign process is iterative and our strategy is emergent.

We are thrilled to involve you in this initiative and benefit from your input.

PREPARING FOR THE WORKSHOP

There are 3 components to the discussion for which we invite you to prepare. Each section lays out the information on which your input will be invited.

Section 1: The vision for Canada's innovation ecosystem 2040 that will be at the core of the deliberative workshop. At the workshop, you will be invited to provide input on the framing, scope, and focus.

Section 2: The list of proposed milestones and the main goals around which the vision for 2040 is articulated.

Section 3: The foreseeable challenges to realising the vision for 2040. At the workshop, you will be invited to identify challenges that may impede the realisation of some of the milestones.

Please review each section in advance of the workshop. You are welcome to make notes and bring them to the workshop, but you are not required to do so. The deliberation is a crucial part of the process, and the exercise aims to ensure that we learn from each other and come to a shared vision through iterative reflection and dialogue.

1 Vision

TALENT AND CONNECTIVITY FOR AN INTEGRATED INNOVATION ECOSYSTEM

Canada has the strategy, policies, and programs to bolster knowledge and talent mobilization across disciplines and sectors in a fully connected innovation ecosystem that promotes sustainable social, cultural, environmental as well as economic prosperity.

1. **Purpose**. The Canadian research and higher education systems are informed by an integrated innovation strategy that places knowledge and talent for social innovation and techno-social transitions at the foundation of societal and economic prosperity.
2. **Talent**. Innovation ecosystems benefit from the diversity and mobility of their multidisciplinary talent. Higher Education generates the human capital that bolsters innovation across all zones of impact.
3. **Connectivity**. Canada's innovation strategy is empowered by capacity builders and mediators across all zones of impact. Talent and infrastructure are in place to ensure that all aspects of the innovation process are supported, from design to implementation.

CANADA'S INNOVATION ECOSYSTEM. VISION for 2040

In 2040, Canada's innovation strategy, policies and programs have fully integrated and reconciled the objectives of sustainable economic growth, equity-focused social development and agile techno-social transitions. In particular, the social sector (nonprofits, para-public organisations, municipalities) is equipped with dedicated innovation strategies. The social and economic infrastructure has been created to support an ongoing effort to address societal, global and/or systemic challenges. Sustained intentional action focused on human capital, talent mobility and ecosystem connectivity is providing stakeholders across all sectors with access to knowledge and technology they need, and the country is outperforming on all OECD's innovation indices. Stakeholders' clear understanding of their mutual and reciprocal roles in the innovation ecosystem buttresses connectivity, and leads to new types of equity-focused knowledge partnerships with higher education institutions. A new wave of highly qualified talent that harnesses the benefits of interdisciplinary, cross-sectoral training is being deployed across the innovation ecosystem a way that benefit societal prosperity. Policies and programs are in place to bolster the role of highly qualified personnel (HQP) in all sectors of activity, and fuel an ecosystem in which human- and community-focused investment boost equitable, sustainable social and economic growth.

YOUR INPUT ON THE KEY POINTS OF THE VISION

FOCUS	YOUR COMMENTS	YOUR QUESTIONS
Why consider social innovation as part of the broader, integrated innovation agenda for Canada?		
Why focus the integrated innovation strategy on highly qualified personnel and postgraduate talent (MA and Ph.D.) as opposed to, e.g. knowledge mobilization?		
What does talent mobility that bolsters innovation across sectors look like? What should work-integrated learning (WIL) and experiential learning achieve?		
What does "innovation ecosystem connectivity" look like and whose job is it to build it?		
Something else?		

2 Goals and Milestones

INSTRUCTIONS

Below are the goals around which the vision for 2040 is articulated, and the associated list of proposed milestones. A milestone is an intermediate step between the starting point and the vision for 2040. It refers to a state of affairs specific at a specific moment in time, not to a process that takes place over a period.

At the workshop you will be invited to identify the milestones that you would like to see modified or amended, as well as one or two that you think are missing.

Goal 1. Canadian R&D Systems Have an Integrated Innovation Strategy.

What is needed for social innovation, societal impact, and techno-social transition to be an integral and foundational part of the Canadian innovation strategy?

MILESTONES	YOUR INPUT
1. Incentives for R&D and innovation (e.g. R&D tax credit equivalents) have been extended to all sectors.	
2. Canada's strategy rests on a sophisticated understanding of the processes that lead to innovation at the various zones of impact, and dedicated support is adequate.	
3. Frameworks used to guide action for economic and societal prosperity across sectors take into account social and societal impact in all its forms.	
4. Academic cultures embrace practices that leverage interdisciplinary scholarship to streamline innovation and societal impact.	
5. Funding organizations and HEIs create incentives and rewards (e.g. criteria that guide their merit review and hiring processes to increase their community impact and innovation 'score')	
6. Support for Universities' third mission is institutionalised and accordingly reflected in all practices around hiring, recognition and reward.	
7. Canadian HEIs (and colleges) generate the highly qualified talent that Canada needs across all zones of impact.	
8. Social sector and community needs around knowledge flow and innovation are clearly identified and HEIs help cater to these needs with the support of dedicated research and knowledge mobilization funding programs.	
9. Indigenous-led initiatives and strategies are an integral part of the innovation ecosystem.	
10. Canada's innovation strategy and support system for science is informed by a solid understanding of the balance between investigator-led and mission-driven research in all zones of impact.	
11. Research funding programs are designed to foster inclusive and diverse interdisciplinary cultures in which excellence and high levels of accountability bolster inclusive innovation across all zones of impact,	
12. Models of "resources flow" for innovation used by policymakers take into account investment and impact in both economic and social sectors.	
13. Canada's innovation strategy is aligned to Canada's commitment to sustainable development goals.	
14. HEIs' impact strategy is aligned with Canada's commitment to sustainable development goals.	
15. Canada has developed meaningful frameworks to ensure accountability and to assess economic and social/human impact of innovation that reflect the complexity of all sectors of activity.	
16. The principles underpinning the San Francisco Declaration on Research Assessment (DORA) are incorporated in all aspects of impact assessment in research.	
17. Dedicated innovation infrastructure ensures that innovation is supported by intersectoral platforms for partnership and collective action for economic and social impact.	
What did we miss?	

Goal 2. Innovation Ecosystems Benefit from the Diversity of its Empowered Multidisciplinary Talent

> **What would it take to increase access to human capital that bolsters inclusive innovation? What are the hold-ups and specific challenges in higher education, industry and the public and social sectors?**

MILESTONES	YOUR INPUT
1. Postsecondary institutions and other knowledge stakeholders deliver programs to build the skills and expertise and produce the talent Canadians need to support innovation-driven, inclusive social and economic prosperity.	
2. Support for HEIs' third mission has reshaped training in research to focus on the impact of talent and knowledge mobilization across all zones of impact.	
3. HEIs' funding models drive interdisciplinarity.	
4. Those holding postgraduate degrees find employment across the ecosystem where they can laterally transfer skills for inclusive and collaborative innovation.	
5. Incentives exist for employers that deploy resources to hire, foster and retain talent for innovation in all sectors, including community nonprofits.	
6. The specific needs for innovation-driving talent and knowledge in each sector have been identified and HEIs are tailoring programs and strategies accordingly.	
7. Universities and other stakeholders are mutualizing needs and assets to develop resources to address needs around foundational skills for innovation in all zones of impact.	
8. Talent development programs for transversal skills are intentionally built in all HEIs to streamline the design and scaling of innovation across all zones of impact.	
9. University and College-grown talent is intentionally built to support social innovation and accelerate techno-social transitions.	
10. Training is designed to support connectivity, and talent is equipped to address complexity and issues that emerge at the system-level.	
11. Graduate training is intentionally designed to prepare for both academic and non-academic employment.	
12. Community impact and innovation is an explicit aspect of talent building in all fields of study.	
13. Complexity is a foundational aspect of graduate training in all fields of study.	
14. Skills for collaborative and inclusive innovation are part of graduate training in all fields of study.	
15. Design-, Ideas- and Living Labs have the resources to support experiential learning for emerging researchers and HQP.	
What did we miss?	

Goal 3. Innovation Ecosystems Have Fully Enabled Capacity Builders.

What talent and infrastructure are needed across the ecosystem (HEIs, social, public, private) to support the full innovation process in all zones of impact?

MILESTONES	YOUR INPUT
1. The social sector (including community nonprofits, education and health stakeholder organisation and municipalities) is equipped with a dedicated innovation strategy and can access the talent it needs to advance community development and buttress social innovation.	
2. All levels of government are equipped with guidelines and policies that ensure that innovation ecosystems are fully enabled in all zones of impact.	
3. Canada has the infrastructure to support agile, equitable, evidence-based response to challenges and opportunities that require social innovation and techno-social transitions.	
4. HEIs' talent and knowledge mobilization efforts are guided by the principles of equitable, collective action.	
5. All levels of public organizations, including municipalities, play a role in supporting connected, and innovating communities.	
6. HEIs are connected to communities and play a role in fostering social innovation locally, nationally, and globally.	
7. Communities are connected to HEIs in reciprocal relationships giving them better access to resources that allow communities to do research and innovate.	
8. Innovation infrastructure is designed to increase the flow of knowledge between HEIs and communities and to support cross-sectoral collaborations in all sectors of activity in a connected innovation ecosystem.	
9. Third mile organisations whose role is to streamline access to talent and knowledge/expertise offer programming tailored to the needs in all zones of impact.	
10. The human and financial costs of connectivity are explicitly factored into project development and grant funding.	
11. Funding, resources and frameworks are available to support equity-based cross-sectoral social innovation in all zones of impact.	
12. HEIs offer specialised equity-based training around social innovation, knowledge mobilisation, tech transfer, and system mediation to ensure expertise across the innovation ecosystem.A	
13. Connectivity and resource flow are driven by a widespread understanding of systems dynamics and complexity in all zones of impact.	
14. Community nonprofits, para-public organizations, and municipalities are hiring abd retaining highly qualified personnel (HQP) with the skills to support their participation in the innovation ecosystem	
What did we miss?	

3 Challenges

INSTRUCTIONS

In preparation for the workshop, we invite you to identify possible challenges to a vision for Canada 2040. Specifically:

- What implementation challenges do you anticipate in establishing these milestones?
- Do you perceive strong tensions between stakeholder priorities linked to these milestones?

Goal #	Milestone #	What Challenge do you foresee?

GLOSSARY

Capacity: The ability of an organization to perform work, or the level of an organization's capability to deliver services, programs, and products as part of fulfilling its mandate or mission.

Connectivity: a feature of a system that allows for knowledge, expertise and resources to flow; connectivity is multilayered and multifaceted. It bridges organisations across all sectors in an innovation ecosystem and affects all zones of impact.

EDI: An abbreviation for: 'equity, diversity and inclusion'.

Experiential Learning: The acquisition of knowledge and skills through practice and upon reflection of a period of engagement, observation, and/or immersion. 'Experiential learning' and 'work-integrated learning' are often used interchangeably. An experiential-learning partnership is a community-based collaboration between an organization and a higher education institution that revolves around the hosting, facilitating, and supporting of one or more students involved, for instance, in program, service, or project delivery.

HQP: Highly qualified personnel in this context refers to those having received advanced training at the graduate, MA, or Ph.D. level in any academic discipline.

Innovation Process: A series of actions or steps designed to create, improve, or implement ways of doing, framing, knowing, or thinking, intended to create new value.

Innovation: innovation is the outcome of knowledge use: at the most general level, what leads to innovation is a series of actions or steps designed to create, improve, apply, or implement knowledge, research, evidence, and/or expertise to new ways of doing, framing, knowing, or thinking, and intended to create new value.

Innovation ecosystem: The multilayered and multifaceted collection of interconnected institutions and organizations through which the resources, talent, and information that support, interact with, and affect innovation flow.

Knowledge Mobilization: Knowledge mobilization is an umbrella term encompassing a wide range of activities relating to the production and use of research results, including knowledge synthesis, dissemination, transfer, exchange, and co-creation or co-production by researchers and knowledge users (source: SSHRC). In practice, it overlaps in substantial ways with other types of activities traditionally associated with teaching and learning, such as service learning and experiential learning (see, Methodology: Charting, infra). SSHA: Social Sciences, Humanities, and Arts disciplines. Statistics Canada groups all non-STEM disciplines together: Business, Humanities, Health, Arts, Social science, and Education (BHASE).

Research and Development (R&D): The planned creative work aimed at new knowledge or developing new and significantly improved goods, programs, and services. This includes both basic research and applied research and development; the latter is the use of research and practical experience to produce new or significantly improved goods, programs, services, or processes.

Resilience: The ability to effectively respond to and adapt to systemic change, seeking a balance of social, environmental, and economic needs.

Skill: An aptitude, competency, or ability broadly construed.

- Foundational skill: A broad range of abilities and knowledge understood to be essential to employability and citizenship, and generally associated with social and emotional intelligence as well as cognitive literacy. They include critical thinking, problem-solving, creativity, self-management, intercultural competence, and effective communication.

- Technical skill: a domain-specific skill that is usually associated with applied training.

Social enterprise: A business model with the dual focus of social (and/or environmental) and economic gain.

Social finance: any type of financial service that utilizes private funds to support social goals, address social problems, and/or facilitate social change. According to Economic and Social Development Canada, social finance is the practice of making investments intended to create social or environmental impact in addition to financial returns.

Social impact: is predicated on specific activities or outputs (e.g. programs, services) and their outcomes. An organization's social impact is the measurable outcome of its products, programs, services, etc. that are created and delivered to address a specific social need.

Social innovation: The phrase "social innovation" is used in multiple contexts to refer to new ideas, services, processes, or frameworks intended to meet social needs or create impact for the public benefit as well as those involved in addressing wicked problems that are rooted in systemic issues. Here we make a distinction between **innovation for social impact** in the social sector that follows traditional logics and **innovation for social transformation**, which targets systemic societal issues.

Social transformation: is a matter of collective, intentional, systems-level change. Social transformation is an intentional process through which transformational change is effected across social systems to address emerging social crises and global challenges. Social innovation happens as a result of coordinating the actions of multiple stakeholders in a system toward a collective goal.

Social research and development (social R&D): Evidence-based methods and practices intended to acquire, absorb, and/or utilize knowledge, often to create or improve processes, products, and/or services in the social sector.

Social sector: An umbrella term denoting the activities of organizations that identify with and operate for the public benefit, including co-operatives, non-profits, registered charities, social enterprises/B corporations, or unincorporated grassroots or community groups. It is sometimes referred to as the "third sector", in contrast to what has traditionally been labeled the private and public sectors. Recently, the emergence of "social enterprise", i.e., a for-profit business model embracing social and/or environmental goals, has made traditional boundaries between sectors in mixed economies more porous.

Talent: in this context, 'talent' means the same as 'HQP': those with skills acquired as part of advanced (graduate, MA, Ph.D.) training in any academic discipline.

Zones of Impact: Knowledge use and research practices are shaped by the specific knowledge needs of specific knowledge users across the innovation ecosystem. Knowledge creation and use happens in broad and overlapping "zones of innovation and/or impact". The framework proposed here was initially used to organise evidence generated through a review of the literature guided by the following questions:

- What processes underpin knowledge use at the science-society interface?

- What are the barriers to knowledge use and/or innovation in the different zones of impact at the science-society interface?
- What are the drivers of knowledge use and/or innovation in the different zones of impact at the science-society interface?
- What skillsets and know-how are required of individuals working in the different zones of impact at the science-society interface to support these processes?

ZONES OF IMPACT	
Economy	Higher education institutions (HEI), governments, and industry cooperate to create technology-driven economic growth. Research generates new ideas, and innovation is typically the result of "commercialization", "technology transfer", and similar activities that benefit from the support of industry liaisons and technology transfer offices who act as intermediaries to push out research and pull in investment partners.
Policy	Knowledge and expertise needed for policy making may extend to any aspect of HEI-based research and is increasingly expected to incorporate lived experience and stakeholder input. The co-creation processes through which knowledge is intentionally mobilized for policy making often takes the form of "evidence-support" and "knowledge exchange" deliberation.
Social Sector	The social sector includes all organisations whose purpose is defined in connection to societal well-being. Knowledge mobilisation in the social sector generally aims at supporting practitioners (e.g. medical practitioners, educators, social services providers) by ensuring that they have access to the most recent research in the relevant fields: social, ethical, cultural, legal, educational, and medical. Partnerships between HEIs and social sector organisations also revolved around other types of "community-engagement" activities. At the level of communities, knowledge needs of social sector organisations and municipal governments often overlap.
Social Transition	Social transformation is an intentional process through which systemic change is effected to address emerging social crises, wicked issues, and global challenges. Social transformation happens as a result of coordinating the actions of multiple stakeholders (industry, society, economy and policy) toward a collective goal. For this reason, social transformation revolves around processes that involve the co-design and co-creation of solutions such as those applied in community-based innovation-, design-, or living "labs".