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

# INNOVATION SERVING ALL COMMUNITIES

## A CANADIAN ROADMAP FOR INNOVATION-DRIVEN SOCIAL AND ECONOMIC PROSPERITY

# WORKBOOK

June 11-12 2024, Montréal

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## FORUM HOSTS



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## 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, **Marlieke Kieboom**, Design Chapter director, Ministry of Citizens' Services, British Columbia Public Service, **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 Canada, **Robin Wisener**, Ottawa, **Rahina Zarma**, Senior Policy Advisor at Mitacs.

## FORUM PARTNERS 2024



On behalf of the conveners, our host and our esteemed partners, we want to express the warmest and kindest gratitude for participants' time and input. We are excited to welcome you in Montréal on 11-12 June 2024, and looking forward to the result of our collaborative work: A roadmap for Canada's social innovation ecosystems.

# 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 build capacity for innovation in the social and municipal sectors. The results are shared in the form of a [Consensus Report](#).

Building on this emerging consensus, and with the support of The/La Collaborative and the McMaster University Social Innovation Ideas and Action Lab, over the last couple of years the Canadian Forum for Social Innovation has collected a wealth of additional evidence (focus groups, sense-making, literature review, surveys, inventories) to articulate the challenge. In April and May 2024 in Toronto, Ottawa, Montréal and Calgary, we collected input on a preliminary proposal of the vision and milestones to map the road for Canada's innovation ecosystem.
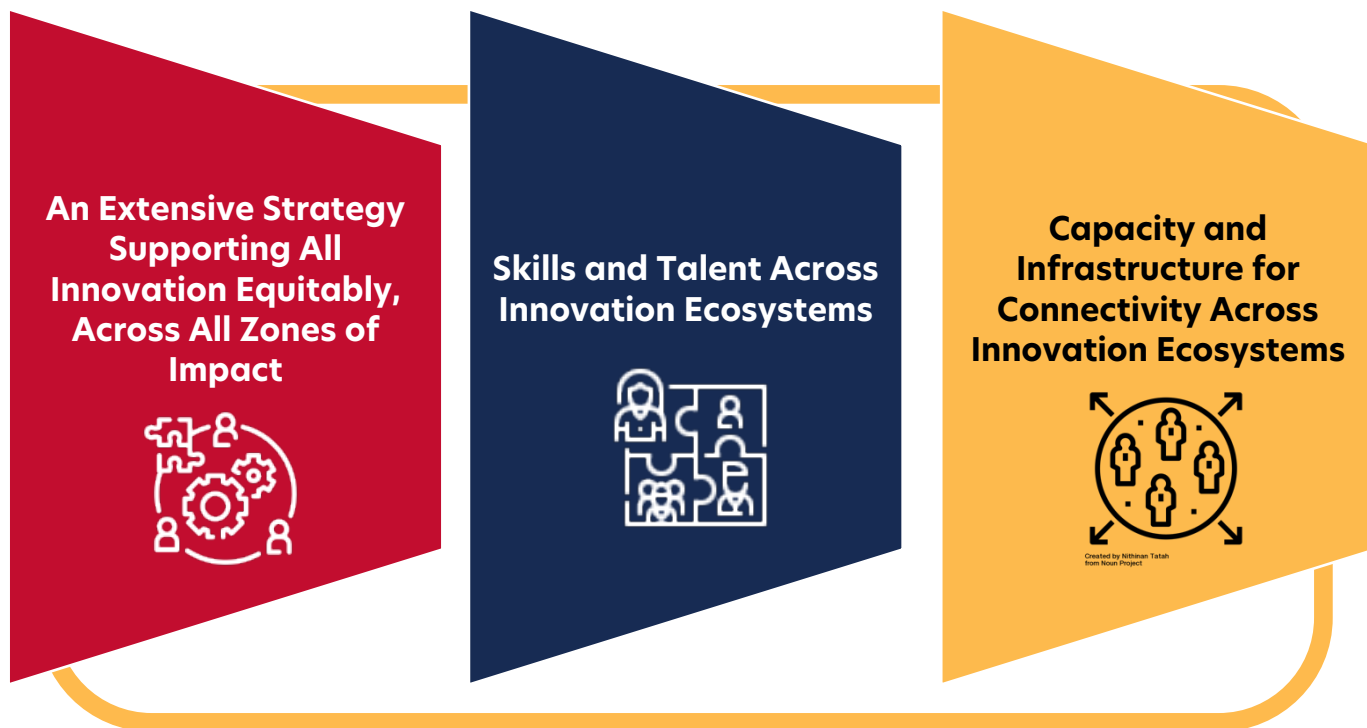
On June 11-12 2024, 125 invited participants will engage in 4 consecutive deliberative workshops. Each workshop is structured to build consensus, progressively and iteratively. Participants will:

- Take ownership of the vision and milestones and map the pathways to 2040
- Set priorities
- Identify the actors to be engaged to achieve the milestones and reflect on the mechanisms necessary to promote concerted action.
- Initiate the elaboration of an action plan.
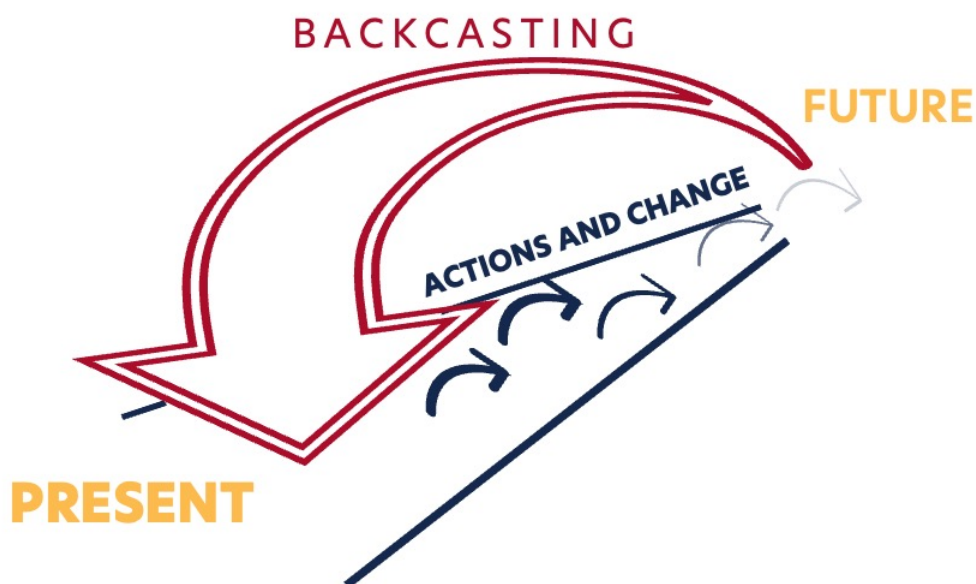
# YOUR ASSIGNMENT

Each participant has been assigned a theme+team (red, blue or yellow), which corresponds to one specific aspect of the vision.

| An Extensive Strategy Supporting All Innovation Equitably, Across All Zones of Impact | Skills and Talent Across Innovation Ecosystems | Capacity and Infrastructure for Connectivity Across Innovation Ecosystems |

The themes overlap copiously, but we think your input will be especially useful with respect to a specific subset of milestones. Assignments were determined on the basis of expertise, ecosystemic role and the needs of a genuinely inclusive and intersectoral dialogue.

## *Your assignment is:*

**An Extensive Strategy Supporting All Innovation Equitably, Across All Zones of Impact**

**Skills and Talent Across Innovation Ecosystems**

**Capacity and Infrastructure for Connectivity Across Innovation Ecosystems**

The schedule below details the logistics of your assignment. Please make sure to meet your group in the room corresponding to your theme colour (they are not always the same!)

| | DAY 1 | | | DAY 2 | | |
|---|---|---|---|---|---|---|
| 9:00-9:30. | Welcomes | | | | | |
| | Session 1 | | | Session 3 | | |
| 9:30-10:15 | Rethinking the foundations of the science and innovation strategy for a socially, culturally, environmentally and economically prosperous Canada. | | | Fostering interdisciplinarity and collaboration for inclusive and accountable innovation in all zones of impact | | |
| 10:30-11:45 | A-2553 | B-2061 | A-3561 | A-2553 | B-2061 | A-3561 |
| 12:00-12:30 | Reflection | | | | | |
| 12:30-14:00 | Lunch | | | | | |
| | Session 2 | | | Session 4 | | |
| 14:00-14:45 | What does "talent" look like in a fully enabled social innovation ecosystem? | | | What does "connectivity" look like in the social innovation ecosystem and whose job is it to support it? | | |
| 14:45-16:00 | A-2553 | B-2061 | A-3561 | A-2553 | B-2061 | A-3561 |
| 16:15-16:45 | REFLECTION | | | | | |

11 June @17:00 Social Program (Check the main schedule)

The final workshop will require each participant to group according to their "actor category". These categories are as follows:



ACTOR CATEGORIES

Research and innovation funders and capacity builders — R

Academic institutions — A

Community funders and capacity builders — C

Social innovation practitioners and networks — SI

Municipal policy-makers and decision-makers — Gov

Business — B

Federal/provincial policy- and decision-makers — Gov

Nonprofits — NP

Your actor category will be confirmed, with your input, upon arrival. Please check-in at the Welcome Table to receive your conference package!

## PREPARING FOR THE FORUM

We invite you to prepare for discussion by reviewing the overall Vision, as well as the Milestones associated with your theme. The Glossary is designed to create a shared understanding of the vision. We recommend warmly that you abundantly refer to it, and we welcome your comments and suggestions.

## VISION

> In 2040, Canada's innovation strategy is intentionally serving communities, and policies are in place across the ecosystem that build the knowledge, talent and infrastructure to equally support social, cultural, environmental and economic prosperity across all zones of impact: social, economic, political and systemic.

**THEME 1. An Extensive Strategy Supporting All Innovation Equally, Across All Zones of Impact.** In 2040, the Canadian research and higher education systems are supported by an innovation strategy and policies that place society at the core of their models  and are designed to serve communities and people. Knowledge and skills mobilization is intentional and responsive to change in every zone of impact, and public funding of innovation fosters overarching prosperity: social, cultural, environmental and economic.

**THEME 2. Skills and Talent Across Innovation Ecosystems.** In 2040, Canadian innovation ecosystems that extend across all zones of impact and are rooted in communities benefit from the diversity, agility, and multidisciplinarity of emerging talent. Universities, colleges, community and industry each play their unique role in generating the skills and expertise that bolster inclusive innovation, and training programs benefits from trust-based, long-term campus-community partnerships across all zones of impact.

**THEME 3. Infrastructure and Capacity for Connectivity Across Innovation Ecosystems.** In 2040, infrastructures (physical, digital, relational) are in place within and between universities,

colleges, industry, social sector and public sector to ensure that the full breadth of innovation processes, from design to implementation, are adequately supported. Innovation is enabled by intentional ecosystem capacity building and transition mediation strategies in all zones of impact.

# MILESTONES

## Theme 1. An Extensive Strategy Supporting All Innovation Equitably, Across All Zones of Impact

> In 2040, the Canadian research and higher education systems are supported by an innovation strategy and policies that places society at the core of their models and are designed to serve communities and people. Knowledge and skills mobilization is intentional and responsive to change in every zone of impact, and public funding of innovation fosters overarching prosperity: social, cultural, environmental and economic.

1. Concerted federal, provincial and municipal innovation strategies, policies and programs are structured horizontally (as opposed to top down) and co-created to operationalise and reconcile the principles of inclusive, sustainable innovation and transitions.
2. Decolonization is a core principle and vector for innovation strategies, policies and programs and Canada's research enterprise fully integrates Indigenous and other ways of knowing.
3. Federal, provincial and municipal innovation strategies rests on high levels of collaboration and inclusive innovation literacy: actors understand the processes that lead to innovation in the various zones of impact, and dedicated learning support is adequate.
4. Incentives for research, development and innovation (e.g. tax credit equivalents, loan forgiveness) have been extended to all zones of impact and fully embrace the diversity of innovation approaches and contexts.
5. Evidence-support is involved in all public decision-making, and is supported by adequately resourced nation-wide knowledge networks and campus-community partnerships.
6. Frameworks guiding action for social, cultural, environmental and economic prosperity are available in all sectors and reflect the diversity of pathways to innovation in all its forms.
7. Federal government agencies (e.g. Statistics Canada) use frameworks to ensure accountability, and to assess social, cultural, environmental and economic impact that reflect the complexity of innovation ecosystems in all zones of impact.
8. New financial instruments (e.g. social finance) are used to redirect the flow of resources and increase regeneration, growth and prosperity across all zones of impact.
9. Academic cultures embrace interdisciplinary and collaborative scholarly practices to bolster innovation in all zones of impact.

10. Universities and colleges adopt an obligation of impact policy and create incentives and rewards (e.g. criteria that guide their merit review and hiring processes) to increase their contribution to community impact and innovation.
11. Support for Universities' impact mission is institutionalised and accordingly reflected in all practices around hiring, recognition and reward.
12. The principles underpinning all aspects of impact assessment in research settings are informed by an adequate understanding of the societal impact mission of universities.
13. Social sector and community needs around knowledge flow and innovation are clearly identified.
14. A purposeful division of labour between universities and colleges is reflected in federal and provincial support of dedicated research and knowledge mobilization funding programs.
15. Indigenous-led initiatives and strategies are an integral part of the innovation ecosystem, and measures are in place to financially and logistically support the creation of such initiatives.
16. Federal innovation strategy and support system for knowledge and science is informed by a solid understanding of the balance between investigator-led and mission-driven research, and the importance of place-based innovation in all zones of impact.
17. Models of "resources flow" for innovation used by policymakers foster place-based innovation and take into account investment and impact in all zones of impact.
18. Federal and provincial funding programs are designed to foster inclusive and diverse interdisciplinary and cross-sectoral cultures in which excellence and high levels of social and economic accountability bolster innovation across all zones of impact.
19. Universities and colleges' impact strategy is aligned with federal, provincial and municipal commitment toward equitable and sustainable development.

## Theme 2. Skills and Talent Across Innovation Ecosystems

In 2040, Canadian innovation ecosystems that extend across all zones of impact and are rooted in communities benefit from the diversity, agility, and multidisciplinarity of emerging talent. Universities, colleges, community and industry each play their unique role in generating the skills and expertise that bolster inclusive innovation, and training programs benefits from trust-based, long-term partnerships with employers across all zones of impact.

20. Universities and colleges' strategies to build and mobilize skills and knowledge are guided by the principles of place-based inclusive collective action and foster prosperity locally, nationally, and globally.
21. Canadian universities and colleges generate the highly qualified talent that Canada needs across all zones of impact.
22. Diverse, highly qualified talent that harnesses the benefits of interdisciplinary, cross-sectoral training is intentionally deployed across the innovation ecosystem to create social, cultural, environmental and economic prosperity.
23. Policies and programs are in place to bolster the role of skills in all sectors of activity and fuel an ecosystem in which people and community-focused investment boost equitable, sustainable social, cultural, environmental and economic prosperity.
24. An intentional approach guides inclusive access to university and college-level education and is bolstered by fully enabled primary and secondary education systems driven by equity and inclusiveness for vulnerable and Indigenous youth.
25. Funding models for universities and colleges drive interdisciplinarity, inclusivity and equity in a genuinely decolonial context.
26. Those holding university and colleges degrees find employment across the ecosystem where they can apply knowledge-based and practical skills they acquired through training intentionally designed to bolster inclusive and collaborative innovation in all zones of impact.
27. Incentives exist for employers to create jobs, hire, foster (e.g. through experiential learning) and retain talent for innovation in all sectors, including community nonprofits.
28. The specific needs for innovation-driving talent and knowledge in each zone of impact have been identified and the division of labour between universities, colleges and employers to meet these various needs is intentional and complementary.
29. Universities, colleges and employers are structuring collaborations around experiential learning and mutualizing needs and assets to bolster talent in all zones of impact.
30. Colleges and universities offer programming to generate interdisciplinary talent for complex societal challenges that require both enabling technologies and human, social and environmental knowledge.

31. Colleges and universities offer programs that build the skills that drive connectivity and interdisciplinarity to address complexity and systemic issues.
32. Graduate training intentionally leads to both academic and non-academic employment in all zones of impact.
33. Social, cultural, environmental and economic impact and innovation literacy are an explicit aspect of talent building in relevant fields of study.
34. Design-, Ideas- and Living Labs in all zones of impact have the resources to contribute to skills-building for innovation (e.g. through experiential learning).
35. Employers in all sectors, and in the social sector specifically, have access to financial resources and have the capacity to support impact and innovation-focused experiential and work-integrated learning.

## Theme 3. Capacity and Infrastructure for Connectivity Across Innovation Ecosystems

In 2040, infrastructures (physical, digital, relational) are in place within and between universities, colleges, industry, social sector and public sector to ensure that the full breadth of innovation processes are adequately supported. Innovation is enabled by intentional ecosystem capacity building and transition mediation strategies in all zones of impact.

36. Concerted federal, provincial and municipal policies support "place-based" innovation for community-level prosperity.
37. Universities and colleges are anchor institutions that support place-based innovation in all zones of impact.
38. Stakeholders' clear understanding of their mutual and reciprocal roles in innovation is leading to new types of equity-focused knowledge partnerships.
39. Federal, provincial and municipal governments use concerted, principled horizontal and multi-level frameworks, guidelines and policies to streamline cooperation and bolster innovation in all zones of impact.
40. Canada has the infrastructure to support agile, equitable, evidence-based response to challenges and opportunities in all zones of impact.
41. Innovation infrastructure is a place to accommodate complexity and emergence in innovation ecosystems across all zones of impact.
42. Research infrastructures support and create spaces for Indigenous involvement that make practice genuinely inclusive and equitable.
43. Innovation infrastructure extends to intersectoral platforms for innovation partnerships and collective action.
44. Innovation partnerships involving higher education institutions rest on asset-based approaches to collaboration and equitably co-created co-governance models that fully value non-academic expertise in all zones of impact.
45. Communities benefit from asset-based, reciprocal relationships with higher education institutions, and they share talent and knowledge to support place-based research and innovation.
46. Innovation infrastructure is structured to increase the multidirectional flow of talent and knowledge between higher education institutions and communities and support cross-sectoral collaborations in all zones of impact.
47. Actors whose role is to streamline access to talent and knowledge/expertise (e.g. knowledge mobilization, tech transfer, work placement) offer services and resources tailored to needs in every zone of impact.

48. Indigenous and other ways of knowing are valued and receive the support of dedicated infrastructure to generate innovation in all zones of impact.
49. The human and financial costs of connectivity are explicitly factored into infrastructural project development, grant funding and investment for all innovation partners in all zones of impact.
50. Public and private funding, resources and frameworks are available to build capacity for inclusivity, equity and decolonisation in innovation partnerships in all zones of impact.
51. Infrastructure in all zones of impact supports interdisciplinarity and inclusive collaboration at all stages of innovation processes, from design to implementation.
52. Connectivity and resource flow between government and social, cultural, environmental and economic stakeholders rest on high levels of capacity to conceptualise systems dynamics and complexity in each zone of impact.
53. Design-, ideas- and living lab approaches to systems dynamics and complexity enable place-based innovation and sociotechnical transitions.

**Capacity:** The ability of a person 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.

**Highly qualified personnel (HQP**) : In this context, HQP refers to those having received advanced training in any academic discipline, or having acquired equivalent experience in applied contexts. HQP is associated with technical and specialised skills, but innovation also requires high levels of translational skills typically associated with critical thinking, problem solving, creativity and intercultural competences, for instance.

**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:** see highly qualified personnel (HQP)

**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?

The processes involved in ensuring that the relevant knowledge is properly used by the right people to produce the desired impact and innovation are examined in *Skills for Inclusive and Collaborative Innovation* (Discussion Paper by Lapointe and Propst 2023)

| ZONES OF IMPACT | |
|---|---|
| Economy | Universities, colleges, 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 take 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 revolves around other types of "community-engagement" activities. At the level of communities, knowledge needs of social sector organisations and municipal governments often overlap. |
| Systems | Social or systems transformation is an intentional process through which systemic change is effected to address emerging social crises, wicked issues, and global challenges. Systems transformation happens as a result of coordinating the actions of multiple stakeholders (industry, society, economy and policy) toward a collective goal across complex systems. For this reason, social (or systems) transformation revolves around processes that involve the co-design and co-creation of solutions such as those applied, for instance in community-based innovation-, design-, or living "labs". |