

**20 20**

**12 LESSONS TO LEARN**

12 LESSONS

 **McConnell**

# AN INTRODUCTION TO THIS YEAR'S LESSONS

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This year's 12 Lessons is different from our past series. It focuses on the future rather than reflecting on what we have learned over the past year. This is why we have called it 12 Lessons To Learn.

Just as we had finalized the text and imagery for the lessons, COVID-19 struck Canada and forever changed the context for our work. Over the course of 2020, we witnessed other historical events, notably, a widespread movement to end systemic racism across society and our institutions. Our initial "lessons to learn" no longer seemed quite so sharp or pertinent. We took them offline for a while, and in that time, our own Foundation underwent a major transition — the retirement of Stephen Huddart, and the appointment of Lili-Anna Pereša to replace him as President and CEO.

We have now given our lessons a second, critical look and tried our best to bring them up to date in this rapidly changing world. We hope some of them resonate with you. If you have any questions or comments about this project, email us at [communications@mccconnellfoundation.ca](mailto:communications@mccconnellfoundation.ca).

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How do you balance conflicting viewpoints within a clear mission?

## HOW DO YOU BALANCE CONFLICTING VIEWPOINTS WITHIN A CLEAR MISSION?

The complexities of social change require that organizations have a clear strategic vision. However, efficient organizations must also remain open to the critical perspectives of diverse partners and stakeholders, and must respond rapidly to changes of context — such as a worldwide pandemic. This combination can create difficult and dynamic tensions.

In 2019, McConnell developed a five-year strategy to accelerate the inclusive transition to an equitable net-zero carbon economy and reached out for input from a diverse cohort of stakeholders. While opinions about the strategy did not all converge, the process improved our approach and strengthened relationships among diversity of actors. This experience prompts us to ask how can foundations best set up open partnerships and ongoing consultations to make room for constructive disagreement, shared learning and a better alignment across different sectors of society, as well as the necessary reflexes to pivot to new strategies when circumstances demand it.



How do we use "small change" to generate big changes?

# HOW DO WE USE "SMALL CHANGE" TO GENERATE BIG CHANGES

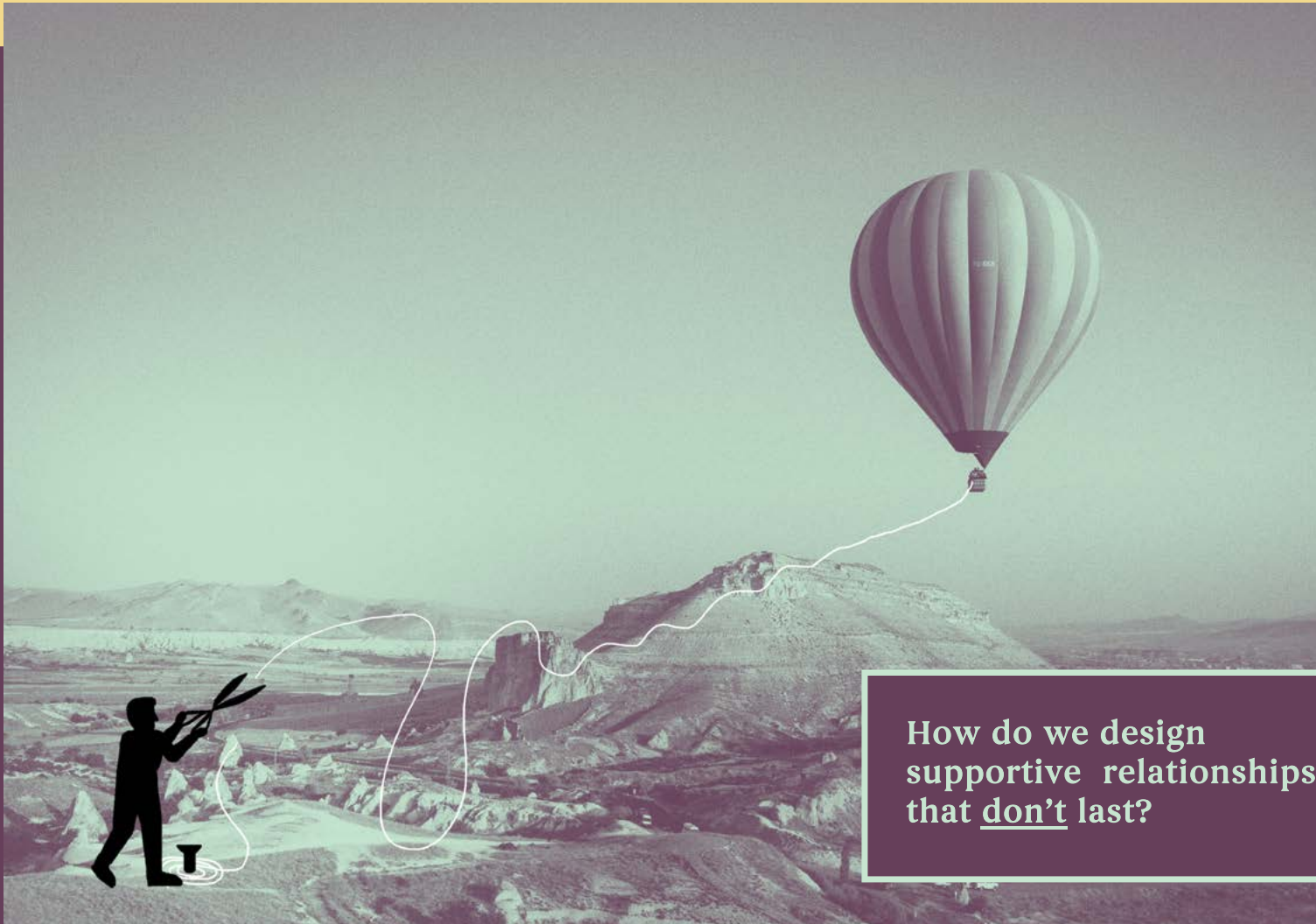
Although McConnell's endowment makes us one of the largest private foundations in Canada, we are a relatively small player in most sectors where we hope to catalyze systemic change.

Our endowment enables us to make grants and responsible investments, but progress is often more far-reaching and enduring when we take the time to work through coalitions, partnerships and policy awareness activities designed to influence larger systems. For example, in response to COVID-19, we joined 70 foundations in the Give5 Campaign, all of whom increased their disbursement quotas to meet urgent needs.

From an independent survey of the organizations we support, we know many appreciate an 'ecosystem' or coalition approach that links the efforts of many to achieve outcomes beyond the reach of any one organization or sector. But some find building larger initiatives cumbersome and confusing and just want to be left alone to do what they do best.

How do we strike an optimal balance between the two?





How do we design supportive relationships that don't last?



# HOW DO WE DESIGN SUPPORTIVE RELATIONSHIPS THAT DON'T LAST?

McConnell funds social innovation with the intention of contributing to systemic change. While philanthropic grants can help innovative projects get off the ground and achieve scale, overreliance on a sole funder can sometimes impede progress. An initiative will only endure if it can establish self-sufficiency through revenue diversification, or sustained policy change.

We encourage grantees to work this way but sunsetting funding for individual projects can still be disruptive for both them and us. How do we better manage expectations, communications and timelines so that grantees envision and attain better outcomes while reducing dependency?



**How invested should we be in systems we want to transform or replace?**

## HOW INVESTED SHOULD WE BE IN SYSTEMS WE WANT TO TRANSFORM OR REPLACE?

Given our commitment to supporting the transition to an equitable, net zero carbon economy, we are often asked whether we will divest from fossil fuel companies. It comes down to whether to engage with them in order to influence their management and governance, or direct those investments to renewable energy providers instead. Is it possible to find a balance between the two approaches?

At what point does the primacy of the climate crisis compel us to prioritize divestment over continuing to press for an industry-wide phase out that provides workers and communities with time and resources for transition? And what about the financial risk in holding assets when future value and demand are in doubt? Such questions, which do not have simple answers, are shaping our discussions about investing for impact.



Can we "scale up"  
without losing touch  
with the ground?

## CAN WE “SCALE UP” WITHOUT LOSING TOUCH WITH THE GROUND?

McConnell’s theory of change involves collaboratively scaling up social innovations via sustained engagement with charities, non-profits, the private sector, public institutions and governments. Our efforts are increasingly coordinated through philanthropic collaborations aimed at achieving sustainable impacts in the face of major challenges.

While we have strong relationships with many stakeholders and partners and our charitable mission gives us a moral as well as a legal accountability to the broader sector, as a private foundation our only legal accountability mechanism is to the Canada Revenue Agency and our Board of Trustees.

As we seek to create deeper change through the “scale up” strategy of policy advocacy conducted with funder collaboratives, how can we continue to act responsibly towards communities and be guided by their knowledge and their interests? How do we continue to maintain healthy and vital relationships when in-person gatherings are foreclosed indefinitely?





What is the right balance between urgent issues and a long view?



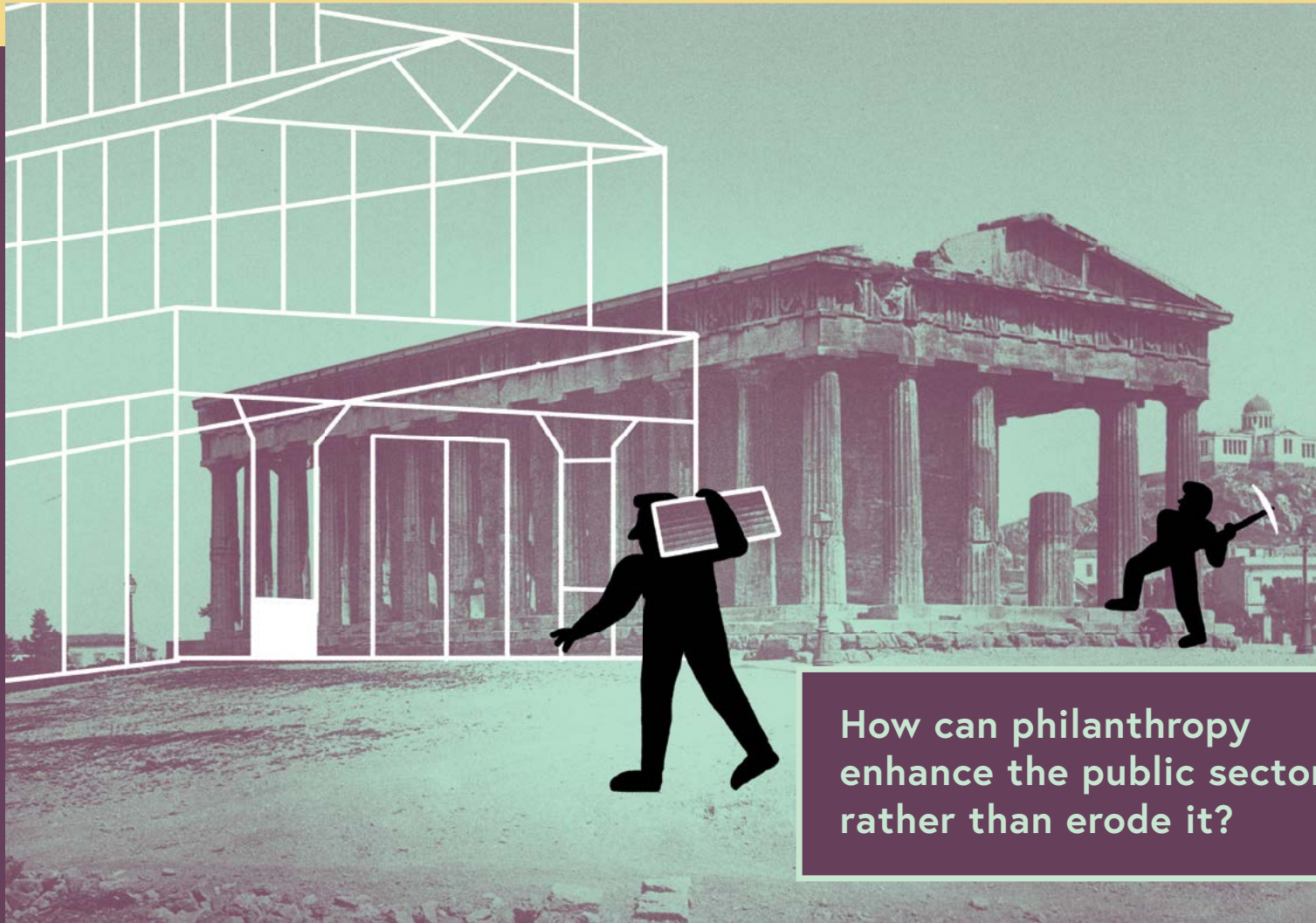
## WHAT IS THE RIGHT BALANCE BETWEEN URGENT ISSUES AND A LONG VIEW?

The way most foundations operate is by investing an endowment of capital and disbursing a percentage of their return on investment (at least 3.5% from a legal standpoint) to social and environmental organizations. For McConnell, this approach has made capital available over a number of years while retaining plenty for the problems of the future. Considering the challenges of our current era, we're grateful that J.W. McConnell had the foresight to create the Foundation in 1937, rather than commit all of his philanthropic capital on an annual basis.

However, in October 2018, the Intergovernmental Panel on Climate Change warned that the world had just 12 years left to address the climate crisis. There are only nine years left today, as emissions continue to rise in Canada.

In 2020, we faced additional emergencies — a global pandemic, the associated social effects, particularly among marginalized communities, and a crisis of credibility among many mainstream institutions because of systemic racism.

As we grapple with the urgency of the current moment and what it implies for our work, questions arise for all foundations: should we spend a greater percentage of our endowments? How much? Are there better ways to leverage our current spending? If we spend more today, how do we provide for the increasingly complex problems of 2050 or 2100?

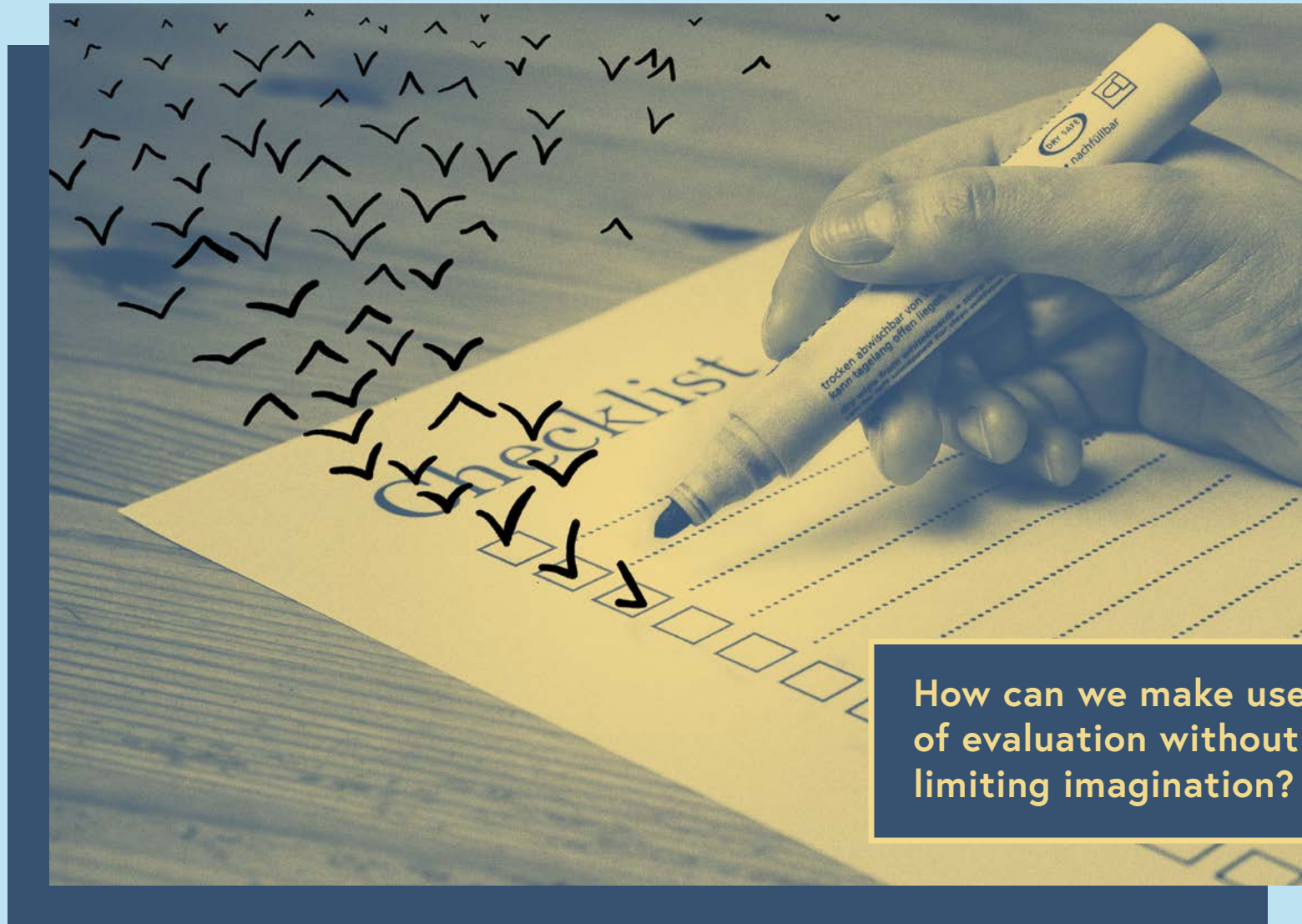


How can philanthropy enhance the public sector rather than erode it?

## HOW CAN PHILANTHROPY ENHANCE THE PUBLIC SECTOR RATHER THAN ERODE IT?

As social and environmental problems proliferate, the public sector is experiencing pressure to adapt. With COVID-19, the role of government has become even more critical. But government processes and accountability structures can stand in the way of agile social R&D. Meanwhile, with the lifting of restrictions on civil society participation in policy advocacy, and journalism becoming a charitable activity, there is growing government interest in collaboration with civil society and philanthropy around what economist Mariana Mazzucato calls “mission-based innovation”. This can include joint convening; participation in “solutions labs”; granting for social R&D; making matching grants to extend government funding; and structuring outcomes funds to co-finance systemic change.

However, history warns that private philanthropy has the potential to erode the public obligations of the state, by occupying roles that are most appropriately held by democratically elected, tax-funded governments. As foundations engage around issues facing public institutions, how do we ensure that our efforts contribute to public sector capacity and accountability, and not diminish them?



How can we make use of evaluation without limiting imagination?

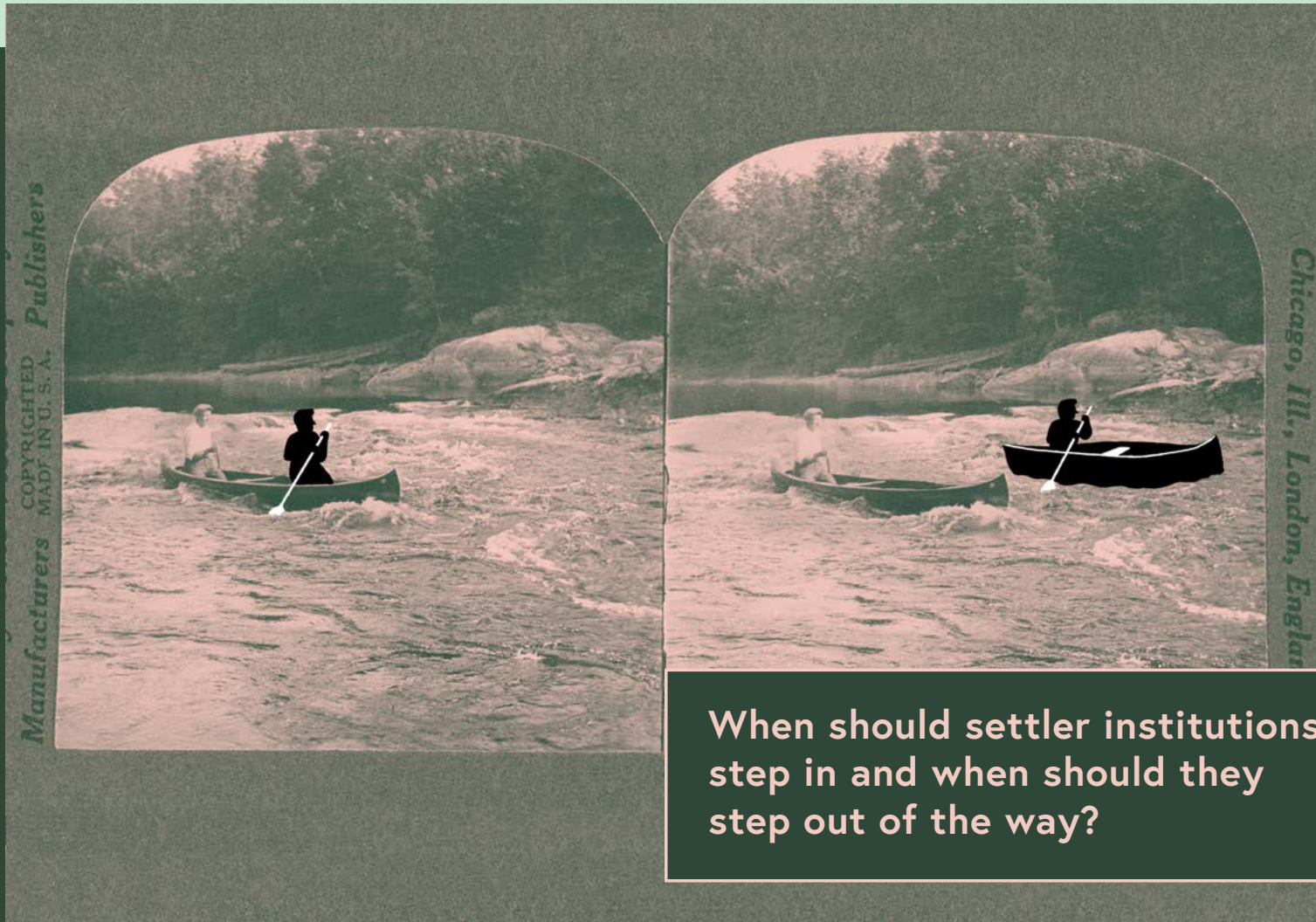
## HOW CAN WE MAKE USE OF EVALUATION WITHOUT LIMITING IMAGINATION?

Evaluation helps foundations understand program impact and inform decision-making. However it has a tendency to promote strategies that are easily measured. This ignores systems change approaches which are too complex and interdependent to capture with tools that measure cause and effect.

This paradox emerged in the WellAhead initiative, which began with a change model based on solid evidence. While the initial approach focused on creating incremental change on a school-by-school basis, the problem of school wellness required system-wide intervention. After deliberation, McConnell pursued a strategy that would be more difficult to measure, focused on a larger systemic transformation.

Given the tension between the need to measure results and the emergent character of systemic transformation, how do we use impact measurement without letting it stifle innovation?





When should settler institutions step in and when should they step out of the way?



## WHEN SHOULD SETTLER INSTITUTIONS STEP IN AND WHEN SHOULD THEY STEP OUT OF THE WAY?

With the release of the Truth and Reconciliation Commission's 94 Calls to Action in 2015, Canadians have a blueprint for addressing past harms caused to Indigenous peoples. It is also true that there is a risk of perpetuating old mistakes if we do not engage in this work in the right manner.

So far, most of McConnell's reconciliation work has taken place in close relationship among Indigenous and non-Indigenous innovators. In addition to giving fledgling projects the benefit of being associated with a well-established organization, we have gained from Indigenous wisdom generously shared with us.

As we look ahead to deepening our commitment to reconciliation, a question we are asking with Indigenous advisors, colleagues and partners is: what portion of our resources should be devoted to initiatives run by and for Indigenous people themselves as opposed to McConnell programs and partnerships?



What does a better  
"No" look like?

## WHAT DOES A BETTER “NO” LOOK LIKE?

With so many innovative civil society organizations requesting funding, McConnell is obliged to say “No” more frequently than “Yes” to proposals – in 2019, we received 685 applications and made 192 grants. We know that people put considerable time and thought into their submissions, and we endeavour to review them all carefully. Yet we understand that a declination can feel dispiriting and arbitrary.

A “No” from a foundation doesn’t mean that a particular project or issue is not worthy of support. We therefore ask, “how can we conduct the proposal review process so that even a refusal will be seen as worth the applicant’s time?” What measures of transparency about our decision-making processes can build their confidence and insight into how to move their projects forward? What is the appropriate amount of time for us to spend on this?



How do we share power and influence?

## HOW DO WE SHARE POWER AND INFLUENCE?

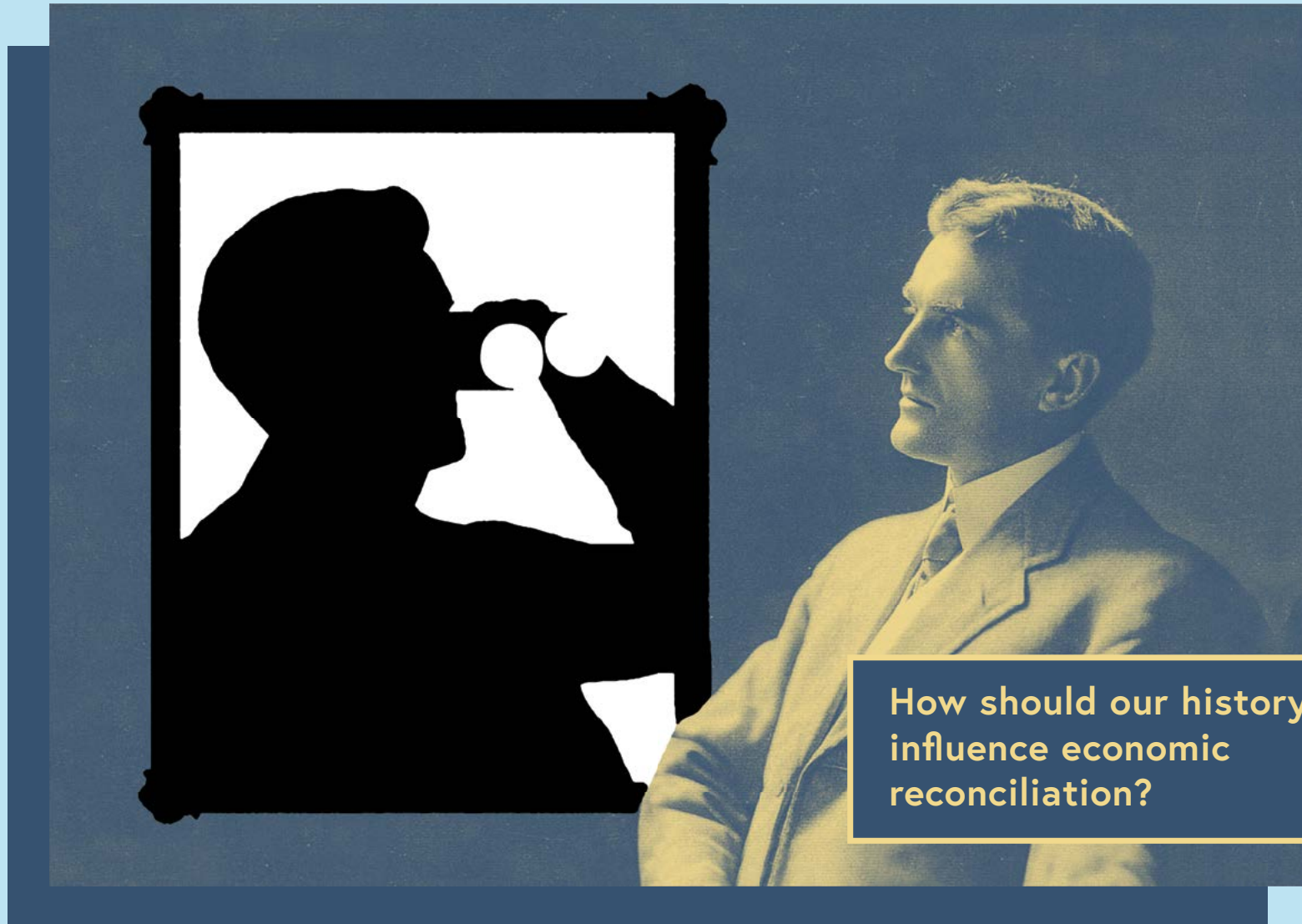
There is a current critique of philanthropy's tendency to decide what is best for others, and to undervalue community organizations' local knowledge and relationships. While some argue that the answer lies in foundations relinquishing their power and influence, another option is to share them.

When the McConnell Foundation became involved with the Winnipeg Boldness Project, to improve outcomes for children and families in the city's largely Indigenous North End, local leaders insisted that key decisions be made by the community. By agreeing, the Foundation enabled Boldness to apply polycentric governance, whereby social agencies, parents, Elders, researchers and funders are consulted on an ongoing basis.

While successful at the local level, Boldness has sometimes asked for help in influencing governments, securing other funders and connecting with similar work in other parts of Canada.

Can foundations evolve their role to more openly share influence with community partners? Is this an effective way for foundations to support Indigenous-led groups, as well as racialized communities? And can it serve as a model for trust-based philanthropy that helps repair the damage of colonization?





**How should our history influence economic reconciliation?**



## HOW SHOULD OUR HISTORY INFLUENCE ECONOMIC RECONCILIATION?

The McConnell Foundation's endowment is built upon wealth that J.W. McConnell amassed over the course of his lifetime (1877-1963). A man of vision, intelligence, industry and generosity, he also lived during a period when Canada was expanding its colonial power at the expense of Indigenous peoples.

The Foundation made its first grant to an Indigenous organization in 2003, and today has an extensive portfolio of contributions and investments focussed on Indigenous issues and partnerships. In 2015, at the concluding event of the Truth and Reconciliation Commission, we joined with other foundations in signing the Philanthropic Community's Declaration of Action. We now ask ourselves and our peers, "How can foundations advance economic reconciliation in the decade ahead?"

# 12 LESSONS SHARED

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A COLLECTION OF LEARNINGS AND OBJECTS FROM  
ACROSS THE MCCONNELL NETWORK IN 2018

# 2018

# ABOUT

We believe that when we all learn together, we can transform systems, and we hope that this project contributes to a larger dialogue of learning among diverse audiences.

Learning is an integral part of McConnell's theory of change. We believe that self-reflection and sharing our distilled insights are key to ensuring that our experiments in philanthropy, social finance, and convening can be integrated into the work of our foundation and potentially, the sector as a whole.

In 2016, in an effort to conduct our learning more publically, we launched a project called 12 Lessons Learned that featured a selection of the McConnell staff's hardest won lessons. In 2017, through 12 Lessons (un)Learned, we practiced the kind of learning needed in the era of reconciliation. This year, in an effort to broaden the learning dialogue, we have sought out lessons from members across our network: we're calling it 12 Lessons Shared.

We asked our grantees, partners and fellow travellers from across the country to reflect on the past 12 months. We then asked them to articulate an important lesson and share an object that represents their learning journey. As the lessons and objects poured in from across the country (and across the Atlantic in one case) they were staged and photographed by Brendan George Ko who brought his careful attention to capture the subtle metaphors and meaning within the learning story of each object.

We believe that when we all learn together, we can transform systems, and we hope that this project contributes to a larger dialogue of learning among diverse audiences.

1

Failure is fun to talk about, it sucks to do.

4

Take time to go back to the land.

7

Collaborations flourish around strong visions, loosely held.

10

Reconciliation requires an openness to new ways of seeing, learning, and sharing information.

2

Unity of culture is possible despite a diversity of tactics.

5

Different viewpoints don't always produce different points of view.

8

Innovations don't emerge, they are patiently excavated from the status quo.

11

There is no such thing as an absolute win or an absolute defeat.

3

The words "If people would just..." are never part of an effective social innovation.

6

Hold your theories accountable to perspectives from the ground.

9

Beware of the opportunities that get obscured by your plan.

12

Ideas from the periphery need allies from the centre.



# FAILURE IS FUN TO TALK ABOUT, IT SUCKS TO DO.

**ANNIE KIDDER**  
EXECUTIVE DIRECTOR, PEOPLE FOR EDUCATION

◀ **Pictured:**  
A glass of water similar to those served at Annie Kidder's national advisors' meeting.

**There is a lot of fanfare about failure, but that doesn't change the fact that failing can be painful, embarrassing and often unstrategic. If we want civil society to embrace failure and reap the benefits of iterative innovation, we must create environments where admitting failure aligns with the interests of the individual or organization.**

Annie and her team were midway through a significant project to test a new education methodology when they realized that they had failed to identify some problematic assumptions embedded in their approach. Several funders and experts had already invested significant time and resources into the project which made it extremely embarrassing to press pause, delay a scheduled announcement of findings, and rethink the strategy. It took every bit of courage for Annie to admit the mistake in front of a national meeting of advisors. Despite disappointment and some anger, the core partners stood by Annie and her team, enabling them to draw out valuable learnings and move forward.



## ANNIE KIDDER

EXECUTIVE DIRECTOR,  
PEOPLE FOR EDUCATION

Annie Kidder is the Executive Director and a founder of People for Education, an independent, non-partisan, charitable organization working to support and advance public education through research, policy, and public engagement. People for Education leads dialogue about the purpose, value and future of public education; builds links among key constituencies both inside and outside the education sector; and provides evidence to advance public education's promise, and to ensure that all young people have an equitable chance for long-term success.

Kidder regularly provides advice to policy-makers and government, and her writing on education has been published in a range of media. She is the recipient of numerous awards, including, in 2018, an honorary doctorate from York University. She has spoken at conferences in Canada, the United States, Europe, Africa and South America. She is regularly quoted in the media as an expert on education issues. She lives in Toronto. Twitter: @anniekidder [www.peopleforeducation.ca](http://www.peopleforeducation.ca)



# UNITY OF CULTURE IS POSSIBLE DESPITE A DIVERSITY OF TACTICS.

**JESSICA CLOGG**  
EXECUTIVE DIRECTOR AND SENIOR COUNSEL,  
WEST COAST ENVIRONMENTAL LAW

◀ Pictured:  
Jessica's son's  
pentomino  
board game.

**Building a culture of open communication, respect for each others' tactics, and candid personal relationships can set the stage for effective collaboration when most needed.**

The Strathmere Group helps Canada's largest environmental groups coordinate their strategies and communications to be more effective as a sector. The group has long invested in building a strong culture based on trust and respect among environmental leaders. In 2015, when the political landscape shifted, this investment paid off. Building on their strong culture, the group was able to quickly adapt to the new context and engage in coordinated, effective action to advance shared policy priorities despite historic differences in approach and tactics among the groups.



**JESSICA CLOGG**

EXECUTIVE DIRECTOR AND  
SENIOR COUNSEL, WEST COAST  
ENVIRONMENTAL LAW

Jessica Clogg is West Coast's Executive Director and Senior Counsel. She has worked there as an environmental and Indigenous rights lawyer for close to two decades and is the founder of West Coast's RELAW (Revitalizing Indigenous Law for Land, Air and Water) program. Jessica has said that she does the work she does "because she loves the land, and because she believes in justice." Her work has had a particular focus on providing legal and strategic support to Indigenous nations working with Indigenous leaders and community members to use their own laws as a foundation for powerful strategies to protect the lands and resources of their territories and to catalyze broader shifts in Canadian law. Jessica holds a joint Masters in Environmental Studies and law degree from Osgoode Hall, York University, and an Ashoka fellowship recognizing her work bridging between Canadian and Indigenous legal traditions.



**THE WORDS “IF  
PEOPLE WOULD  
JUST...” ARE NEVER  
PART OF AN EFFECTIVE  
SOCIAL INNOVATION.**

**BEN WEINLICK**  
FOUNDER, THINK JAR COLLECTIVE

◀ **Pictured:**  
A urinal without  
the simple target  
technology that  
compels users to  
aim better.

**If your goal is to create social change through behaviour change, strong arguments will rarely suffice. You must also understand people's behaviour and design solutions that disrupt their habits.**

It was an unlikely inspiration that inspired Ben to re-think his approach to advocating for disability rights. While Ben had traditionally focussed on teaching support workers to recognize the rights of their disabled clients, this theory of change was disrupted when he traveled to a design thinking conference at Pixar and learned about a urinal designed with a small target painted in the basin to reduce cleaning costs. The tiny target proved far more effective than the "please aim" signage traditionally deployed by facility managers because its design considered the natural behaviour of the user. Equipped with this unusual inspiration, Ben returned to Edmonton and began the creation of MyCompass Planning, a digital case management system that helps humanize interactions and nudges support workers towards rights-affirming practices: an approach that is far more "target" than "sign."



## **BEN WEINLICK**

**FOUNDER,  
THINK JAR COLLECTIVE**

Ben is driven by the desire to help people and community get better at navigating complex challenges together. He is the founder of Think Jar Collective, co-founder of MyCompass Planning and a senior leader at Skills Society leading Social Innovation Research & Development. Ben regularly trains organizations and facilitates human centred design lab explorations around complex issues for the public sector, corporate clients, non-profits, and community. For his work striving to lead systems change in human service organizations over the last 15 years he has received some awards including the MacEwan University distinguished alumni award, the Government of Alberta Community Disability Service Sector Leadership Award and the Avenue Top 40 under 40 award.



# TAKE TIME TO GO BACK TO THE LAND.

**MELANIE GOODCHILD**  
SENIOR INDIGENOUS RESEARCH FELLOW AND AMBASSADOR,  
SUNCOR FELLOW, THE WATERLOO INSTITUTE FOR SOCIAL INNOVATION  
AND RESILIENCE (WISIR)

◀ **Pictured:**  
A traditional  
birch basket.

**Social Innovation is hard because it sometimes forces the innovator to leave behind the norms and practices that situate us within our status quo. To orient yourself, take time to connect your work to the land and your Elders, for the wisdom therein will help you discover the right way.**

In 2016 Melanie was tasked with a mega-project of establishing the Turtle Island Institute: a project for which there was much fanfare and enthusiasm. While her funders were eager to get going, Melanie had some significant questions about the right approach. At risk of alienating funders, she decided to take time to go back to the land and connect with Elders. Through this process, the right way revealed itself. Rather than an elaborate building with staff as originally imagined, the Turtle Island Institute became a more modular project, focused on building relationships and prototyping ideas in partnership with Indigenous communities.



## MELANIE GOODCHILD

SENIOR INDIGENOUS RESEARCH FELLOW AND AMBASSADOR, SUNCOR FELLOW, THE WATERLOO INSTITUTE FOR SOCIAL INNOVATION AND RESILIENCE (WISIR)

Melanie Goodchild is Anishinaabe, moose clan, a member of the Biigtigong Nishnawbeg in northwestern Ontario. Melanie has a Master of Arts Degree in Sociology and is currently completing her PhD in Social and Ecological Sustainability at the University of Waterloo. She is a Research Fellow and Indigenous Ambassador with the Waterloo Institute for Social Innovation and Resilience (WISIR). She is Senior Counsel, Indigenous Relations at National Office for the Canadian Red Cross (CRC). Melanie was selected as one of 35 women from around the world to participate in the International Women's Forum (IWF) Leadership Foundation's 2015-2016 Fellows Program that includes Harvard Executive Education Training at Harvard Business School in Cambridge, MA, and the Women Leading Global Change program at INSEAD in Fontainebleau, France. She was also one of 28 Canadians selected by the Peter Lougheed Leadership Institute to participate in the first ever Getting to Maybe: A Social Innovation Residency for 28 days at the Banff Centre, in Alberta, in June 2015 and returned to Banff in 2016 as an Alumni Mentor. Melanie sits on the national boards of the Canadian Risks and Hazards Network (CRHNet) and Rhizome Institute for the Future of Food (RIFF). Melanie is an Advisor for the Nourish: The Future of Food in Healthcare program of the J.W. McConnell Family Foundation. She is also a member of the IBA the Iron Butt Association, riding her Harley-Davidson 1000 miles in 24 hours earning her the badge of "one of the world's toughest riders"!





# DIFFERENT VIEWPOINTS DON'T ALWAYS PRODUCE DIFFERENT POINTS OF VIEW.

DIANA BRONSON  
EXECUTIVE DIRECTOR, FOOD SECURE CANADA

◀ Pictured:  
Diana's glasses.



**With different cultures, aesthetics and incentive structures, it can be tempting for social innovators to assume their corporate peers fit the stereotypes of their sector. This is a mistake. There is much to gain by recognizing that all organizations are made up of people with diverse aspirations, inspirations and motivations which provide fertile ground for collaboration.**

When Diana's organization, Food Secure Canada, met with large corporations and conventional farming organizations to discuss food policy, they didn't expect to find much common ground. These expectations were disrupted by a representative from a multinational food corporation who turned out to be a champion for sustainability, forcing Diana to question her assumptions. While different institutions have different incentives and motivations, they are ultimately made up of people who aspire to higher values.



## **DIANA BRONSON**

**EXECUTIVE DIRECTOR,  
FOOD SECURE CANADA**

Diana joined Food Secure Canada as Executive Director in 2012 and has worked to strengthen FSC as the national voice of the Canadian food movement. She has been instrumental in mobilizing a wide diversity of organizations and individuals in a national movement for a food policy that would be equitable, healthy and sustainable. She is an event organizer, a powerful communicator, and a person known to bring diverse people and causes together. Diana is trained as a political scientist and sociologist and has a professional background in journalism (CBC radio) and international human rights (Rights & Democracy) as well as international climate and technology negotiations at the UN (ETC Group.)

# HOLD YOUR THEORIES ACCOUNTABLE TO PERSPECTIVES FROM THE GROUND.

DR. CYNTHIA WESLEY-ESQUIMAUX  
CHAIR ON TRUTH AND RECONCILIATION,  
LAKEHEAD UNIVERSITY

◀ **Pictured:**  
A small piece of  
amethyst from the  
Thunder Bay mine.  
Its rich dark colour  
represents going  
deeper into our  
unconscious where  
healing can happen,  
and this is the work  
Dr. Wesley-Esquiaux  
does across Canada.

**If you want to understand a social system, talk to the taxi drivers. While theories and abstractions are useful, you must hold them accountable to perspectives from the ground.**

In her work, Cynthia Wesley-Esquimaux advocates for a better understanding of history and the ways it shapes Canadian society. While her programs are focussed on popular education, most of her time is spent with policymakers, academics and other administrators. To avoid getting out of touch with Canadian society, Cynthia developed a habit of asking meaningful questions about race, colonization, and history to taxi drivers, people she met on the bus, and just about anyone she has an opportunity to speak with. These conversations challenge the theories she advances in institutions, and keep her theory of change accountable.



**DR. CYNTHIA  
WESLEY-ESQUIMAUX**

CHAIR ON TRUTH AND  
RECONCILIATION,  
LAKEHEAD UNIVERSITY

A member of the Chippewa of Georgina Island First Nation in Lake Simcoe, Dr. Wesley-Esquimaux is deeply committed to public education and active youth engagement, and co-founded the Canadian Roots Exchange out of the University of Toronto. She held the Nexen Chair in Indigenous Leadership at the Banff Centre in Alberta, and is an Adjunct Asst. Professor at Lakehead University and the University of Toronto. She is a former Advisory Member of the Mental Health Commission of Canada and is a Board Member for the Lester B. Pearson College of the Pacific and United World Colleges, and Teach for Canada.

# COLLABORATIONS FLOURISH AROUND STRONG VISIONS, LOOSELY HELD.

LUC RABOUIN  
DIRECTOR & STRATEGIC DEVELOPMENT,  
CAISSE D'ÉCONOMIE SOLIDAIRE

◀ **Pictured:**  
A clay pot, still  
malleable before  
firing.



**Defining the scope of innovative collaborations is a delicate business. Too specific and you leave little room for the contributions of your partners. Too open-ended and your collaboration lacks direction. To address this paradox, collaborators must learn how to hold a vision, without getting too attached to their ideas.**


When McConnell first approached Luc's team with a financing idea, Luc was surprised at how specific their proposal was. They were suggesting something very different to anything Luc's team had done before, and their vision for the collaboration was already quite evolved. His interest was piqued however, when McConnell showed interest in adapting the vision to incorporate ideas, expertise, and constraints that Luc's team brought. This approach allowed Luc's team to know what kind of project they were signing up for, while feeling confident there would be room for their contributions.



## LUC RABOUIN

DIRECTOR & STRATEGIC  
DEVELOPMENT, CAISSE  
D'ÉCONOMIE SOLIDAIRE

Luc Rabouin is a social entrepreneur, an environmentalist and a dedicated observer of urban matters. He is currently Director of strategic development at the Caisse d'économie solidaire but has also occupied leadership positions at the Centre d'écologie urbaine de Montréal, Communauto France (in Paris) and the CDEC Centre-sud/Plateau Mont-Royal. He is an expert in social movement, local development networks and social economy. He holds a Bachelor's Degree in Communication Psychology, a Specialized Graduate Diploma (D.E.S.S) in Community Development and a Master's Degree in Political Science. His book *Démocratiser la ville* was published in 2009 by Lux Éditeurs.



**INNOVATIONS DON'T  
EMERGE, THEY ARE  
PATIENTLY EXCAVATED  
FROM THE STATUS QUO.**

◀ **Pictured:**  
A scale model of  
one of open desk's  
open-source furniture  
designs.

INDY JOHAR  
CO-FOUNDER OF PROJECT 00



**While the products of innovation and culture change get a lot of attention, it is institutions—regulatory, financial, and others—that determine whether an innovation sees the light of day.**

When Indy's company, Dark Matter Labs, set out to create a more democratic and decentralized model of manufacturing, technical innovation came relatively easily. However, they soon realized that the institutions built around the old manufacturing model stood in their way. New kinds of property deeds, warranty models, and copyright regimes were necessary if they wanted to see widespread adoption of a new, better way of making things. While significantly more work, this would become the true legacy of their innovation.



## INDY JOHAR

CO-FOUNDER OF  
PROJECT 00

Indy Johar is an architect, co-founder of 00 (project00.cc) and a Senior Innovation Associate with the Young Foundation and Visiting Professor at the University of Sheffield.

Indy, on behalf of 00, has co-founded multiple social ventures from Impact Hub Westminster to Impact Hub Birmingham and the Hub Launchpad Accelerator, along with working with large global multinationals & institutions to support their transition to a positive Systems Economy. He has also co-led research projects such as The Compendium for the Civic Economy, whilst supporting several 00 explorations/experiments including the wikihouse.cc, opendesk.cc. Indy is an Advisor to the Earth Security Initiative and a director of WikiHouse Foundation. Indy Johar is a co-founder of the Project00.cc Research Laboratory & Skunk Works.

# BEWARE OF THE OPPORTUNITIES THAT GET OBSCURED BY YOUR PLAN.



◀ **Pictured:**  
The key that provided access to an abandoned building in montreal that would become la maison de l'innovation sociale.

ÉLAINE GAUTHIER  
DESIGN CONSULTANT, CITY OF MONTRÉAL /  
URBAN PLANNING OFFICE, HERITAGE DIVISION

**Planning is important. For big, democratic organizations, it helps align efforts and creates accountability. Too much planning and management procedure, however, can cause you to miss out on emergent opportunities. To seize these opportunities, innovative public servants must learn to hold onto their plans with a lighter grip.**

For years, Elaine has been influenced by the fast-moving social innovation movement. She now plays a complex role at the City of Montreal, and has questioned how it could ever be compatible with the careful, deliberate and slow-moving processes of government. A couple of years ago she started to tackle a critical problem: Montreal has many buildings that are vacant or derelict. And yet the city has a growing need for functional space, and neighbourhoods want to support community-led revitalization. When she was approached by Entremise, la Maison de l'innovation sociale and McConnell about a project to unleash urbanisme transitoire, she realized she would have to depart from conventional city practice to capitalize on the opportunity. As a result, more vacant and underused buildings are being repurposed as neighbourhood hubs that address community needs.



## ÉLINE GAUTHIER

DESIGN CONSULTANT, CITY OF  
MONTRÉAL / URBAN PLANNING  
OFFICE, HERITAGE DIVISION

In her role as design consultant for the City of Montréal, Éline Gauthier is putting to use her law and urban planning education, namely by establishing planning agreements with major universities and development agreements for large urban development and redevelopment projects. Since joining the Heritage Division, she has also helped create the evaluation tools required to assess the heritage value of various sites in the city. She played a role in the creation of Montréal's Heritage Action Plan, which was implemented in August 2017. She helped organise the Montréal transitoire symposium and is now in charge of the transient use project specified in the Heritage Action Plan.

# RECONCILIATION REQUIRES AN OPENNESS TO NEW WAYS OF SEEING, LEARNING, AND SHARING INFORMATION.

JEAN-NOÉ LANDRY  
EXECUTIVE DIRECTOR, OPEN NORTH

◀ **Pictured:**  
A sand dollar of  
unknown origin found  
in Jean-Noé's newly  
purchased house.

**The open-data community is built around a firm belief that the world is better off when knowledge is freely available. This principle requires more nuance, however, when it is applied to populations who have experienced systemic expropriation of their cultural knowledge.**

In an effort to behave in accordance with their principles, Open North publishes all of its work under a creative commons license. When Jean-Noé proposed this approach to an Indigenous client, Elders pushed back because of a history wherein their knowledge was used without permission. While this was initially difficult for Jean-Noé, who prizes freely available knowledge, the Elders helped him gain a more nuanced understanding, causing him to recognize that even his core principles must be placed within a relevant cultural context.



## JEAN-NOÉ LANDRY

EXECUTIVE DIRECTOR,  
OPEN NORTH

Jean-Noé Landry is a social entrepreneur and Executive Director of OpenNorth, Canada's leading not-for-profit organization specialized in open government, open smart cities, and civic technology. As an open data expert, he convenes data stakeholders, promotes data standardization, and connects governments to their data constituents. As a co-founder of Montreal Ouvert (whose mission is now complete), he advocated for Montreal's adoption of open data as official policy. As an entrepreneur, he scaled CitizenBudget, an online budget simulator designed to engage citizens in budget decision-making, to more than 150 cities across North America. With a background in organizational change and conflict resolution, he spent 15 years in international development and has worked in more than 12 countries, including Serbia, Kenya, Tunisia, and Ukraine providing support to political institutions and civic movements on coalition building, policy development, and electoral processes. He has led OpenNorth to collaborate with all levels of Canadian government, from Federal institutions to small municipalities, while connecting Canada's open data community to the global open government movement. With its values-driven mission and applied research approach, OpenNorth develops models and engagement practices for inclusive and open smart cities and shared data governance in an era of open data and government transformation. Starting in 2019, OpenNorth will be delivering a new one-to-one advisory service on open smart cities for communities across Canada as the Lead Technical Partner of Evergreen's Future Cities Program for the Government of Canada's Smart Cities Challenge Community Support Program.





CANADA

OFFICE OF THE  
CLERK OF THE PARLIAMENTS

BUREAU DU  
GREFFIER DES PARLEMENTS

I, Richard Denis, Clerk of the Parliaments, custodian of the original Acts of the Legislatures of the former Provinces of Upper and Lower Canada, of the former Province of Canada and of the Parliament of Canada, certify the subjoined to be a true copy of the original Act passed by the Parliament of Canada in the session thereof held in the sixty-fourth, sixty-fifth, sixty-sixth and sixty-seventh years of Her Majesty's Reign, and assented to in Her Majesty's name by Her Excellency the Governor General on the first day of the month of May, two thousand and eighteen, and remain on record in my office.

Je, Richard Denis, greffier des Parlements, gardien des originaux des lois des Législatures des anciennes provinces du Haut et du Bas-Canada, de l'ancienne Province du Canada et du Parlement du Canada, certifie que l'exemplaire ci-joint est une copie authentique de l'original de la loi adoptée par le Parlement du Canada en sa session tenue en les soixante-quatrième, soixante-cinquième, soixante-sixième et soixante-septième années du règne de Sa Majesté, sanctionnée au nom de Sa Majesté par Son Excellence la Gouverneure générale le premier jour du mois de mai deux mille dix-huit et faisant partie des archives de mon bureau.

Given under my Hand and Seal at the City of Ottawa, Canada, on the eighteenth day of the month of September in the year two thousand and eighteen.

Donné sous mon seing et sceau en la ville d'Ottawa, Canada, le dix-huitième jour du mois de septembre de l'an deux mille dix-huit.

Clerk of the Parliaments  
Greffier des Parlements

THERE IS NO SUCH  
THING AS AN  
ABSOLUTE WIN OR AN  
ABSOLUTE DEFEAT.

THE HONOURABLE RATNA OMIÐVAR, C.M., O.O.N.T.  
SENATOR FOR ONTARIO, THE SENATE OF CANADA

◀ Pictured:  
Bill C25 in its final state, without inclusion of Senator Omidvar's additions.

**Social change often requires that activists put blinders on to achieve their goal. While this mindset is necessary to bolster oneself against the inevitable setbacks and distractions, it betrays a deeper truth about social change: there are no absolute wins or defeats, and time can moderate or magnify results.**

Senator Omidvar spent many months working diligently to amend bill C-25—a bill about corporate governance—with a diversity policy that established numerical goals and timelines for representation of marginalized groups on corporate boards and in executive positions. While the amendment failed in the Senate, there were two points of comfort for the Senator. First, regulations following the bill will reflect a definition of diversity, including women, visible minorities, persons with disabilities and indigenous people. Second, the bill will be reviewed by parliament in 5 years so progress can be monitored.



## THE HONOURABLE RATNA OMIDVAR, C.M., O.Ont.

SENATOR FOR ONTARIO, THE SENATE OF CANADA

Ratna Omidvar is an internationally recognized voice on migration, diversity and inclusion. She came to Canada from Iran in 1981 and her own experiences of displacement, integration and citizen engagement have been the foundation of her work. In April 2016, Prime Minister Trudeau appointed Ms. Omidvar to the Senate of Canada as an independent Senator representing Ontario. As a member of the Senate's Independent Senators Group she holds a leadership position as the Scroll Manager. Senator Omidvar is also the Deputy Chair of the Special Senate Committee on the Charitable Sector.

Senator Omidvar is the founding Executive Director and currently a Distinguished Visiting Professor at the Global Diversity Exchange (GDX), Ryerson University. GDX is a think-and-do tank on diversity, migration and inclusion that connects local experience and ideas with global networks. Previously, Senator Omidvar was the President of Maytree, where she played a lead role in local, national and international efforts to promote the integration of immigrants.

Senator Omidvar serves as a Councillor on the World Refugee Council and is also a director at the Environics Institute, and the Samara Centre for Democracy and is the Toronto Region Immigrant Employment Council's Chair Emerita.

Senator Omidvar is co-author of *Flight and Freedom: Stories of Escape to Canada* (2015). She was appointed to the Order of Ontario in 2005 and became a Member of the Order of Canada in 2011, with both honours recognizing her advocacy work on behalf of immigrants and devotion to reducing inequality in Canada. Senator Omidvar has received Honorary Degrees, Doctor of Laws, from Ryerson University and York University.



# IDEAS FROM THE PERIPHERY NEED ALLIES FROM THE CENTRE.

SHAUN LONEY  
CO-FOUNDER, AKI ENERGY

◀ **Pictured:**  
A plumb bob and a circle of stones from lake ontario representing the contrasting 'linear' and 'cyclical' worldviews of western and indigenous worldviews.

**No matter how good their ideas, community groups require the support of large organizations that enjoy the perceived legitimacy of government in order to see their ideas scale.**

Aki Energy's value proposition to government seems clear: let us save you money. Despite their strong track record and clear value proposition, the complicated relationship between government and Indigenous nations meant that Shaun and his team struggled to gain buy-in from the government. By virtue of their familiarity as a longstanding, urban, settler institution, McConnell's support lent credibility to Aki's proposal, enabling them to capture the interest of potential government clients.



## SHAUN LONEY

CO-FOUNDER, AKI ENERGY

Shaun has co-founded and mentored 11 social enterprises, including BUILD Inc, which won the 2011 Scotia Bank EcoLiving Green Business of the Year, and the 2013 Manitoba Apprenticeship Employer of the Year. Before co-founding BUILD Inc, Shaun was Director of Energy Policy for the Government of Manitoba. Loney is the first prairie Canadian to be awarded an Ashoka Fellowship (2015) and was Ernst and Young's Entrepreneur of the Year in 2014. Shaun lives in Winnipeg, with his partner Fiona. Between them they have three boys Aandeg, Weslee and Owen. Shaun is proud to be part of a strong and visionary social enterprise team that is flourishing across the country. Shaun is the author of *An Army of Problem Solvers: Reconciliation and the Solutions Economy*. Shaun's latest book, *The Beautiful Bailout: How social innovation will solve government's priciest problems* is now on sale at [www.encompass.coop](http://www.encompass.coop).

Un  
12 Lessons Learned

From a year of philanthropy

2017



## Artist's Statement: Lessons Unlearned

The power of stories and how we contain or tell those stories have been a continuous source of exploration in my work as a socially-engaged visual artist. I am most interested in creating works that are playful, transformative and challenge assumptions. Using the Woodland tradition of mnemonic painting, vivid colours, and legend, I draw from a legacy of painters from Treaty 3 Territory, where I am from, and Bawating, where I currently live. I am very privileged to work on this project and have the opportunity to shape many of the images in consultation and collaboration with so many people between the worlds of the McConnell Foundation and my own communities. Some of the images in 12 Lessons Unlearned 2017 are inspired by the late Cecil Youngfox, and others by recent desecration of sacred sites, reminding us that there is still a lot of unlearning to be done.

### RIHKEE STRAPP

*Rihkee Strapp: is Wolverine clan and a Metis artist from Red Lake, Ontario.*

## Curatorial Statement: 12 Lessons Unlearned 2017

As a foundation dedicated both to reconciliation and the practice of social innovation, McConnell believes that individuals and institutions must develop the capacity to unlearn.

In 2017, as Canada marks its sesquicentennial, many Canadians struggle to square the revelations uncovered in Canada's Truth and Reconciliation Commission with national myths about the moral virtue of Canadians. Dealing with these competing narratives is uncomfortable, but the ability to unlearn legacy beliefs is an essential capacity if we are to decolonize our institutions, our country and ourselves.

Unlearning is a skill we need for reconciliation but it has a broader application, too. When we can humbly ask "what if I'm wrong about that?" transformative innovation can follow; to conjure forth better paradigms, we have to let frames that once gripped us fall away.

In this year's installment of 12 Lessons we are focused on lessons unlearned, sharing small and large efforts to challenge the deeply held beliefs that stand in the way of a better world.

We were lucky to collaborate with Métis artist Rihkee Strapp to re-interpret the written lessons and give them visual life. Our ideas were reflected back to us, transformed through metaphor and narrative allusions. Many of the images defy any easy explanation and Rihkee has asked that we sit—sometimes rather uncomfortably—with the sensation of not fully understanding. Relaxing our grip on our own interpretations to make way for a very different outside point of view has been a difficult but nevertheless rewarding process.

We hope that you find lessons that resonate with your own experience and that you will reach out to us over the next year with your own unlearnings.

*Created by Adjacent Possibilities, featuring artwork by Rihkee Strapp.*

1

Solutions Finance starts with solutions. *listening.*

4

*Respectful*  
Conflict ~~damages~~ *builds effective* relationships.

7

Criticism is ~~bad for you.~~ *strengthens*

10

Share your *(lack of)* knowledge with others.

2

Philanthropy's responsibility ~~ends where the government's begins.~~ *is to catalyze impact at all scales.*

5

Nonprofits need good tools, *and the right task.*

8

Communities need solutions. *(their own)*

11

Some systems dynamics are too formidable to challenge. *not*

3

To be effective, you must be ~~hands on.~~ *on-hand.*

6

Stick to the plan *(if it still makes sense).*

9

Reconciliation is a project for Indigenous people, *and settlers alike.*

12

Trust emerges when power is shared. *and vision*



## Solutions Finance starts with ~~solutions.~~

*listening.*

**Working in Solutions Finance, one can be tempted to focus on solutions before anything else. This mindset impedes opportunities to learn from others, especially those who are most familiar with the problems that need solving.**

▲  
When Sophie Méchin went to the Indigenous philanthropy gathering on Wasan Island, she brought with her all the chutzpah of a social innovator who had figured out a new solution. After all, the tools being developed by the Solutions Finance team were exciting. Sophie's firm handshakes and fast-talking evangelism met the dubious ear of an Elder named Lee Brown, whose biting and humbling humour reminded Sophie that if she really wanted to help Indigenous communities leverage financial tools, she should start by listening to the experience, the knowledge and the solutions already present within the community.



**Philanthropy's responsibility ~~ends where the government's begins.~~ is to catalyze impact at all scales.**

**Government budgets dwarf those of even the largest foundations, and so philanthropy typically avoids funding projects that should be the responsibility of government. But when governments are unaware of high-leverage opportunities within their mandate, or unable to take the necessary risk, impact-seeking foundations might need to re-consider this constraint.**

▲ While McConnell's Energy and Economy program employs a number of tactics to influence change in Canada's energy system, training government employees has not traditionally been considered, as this was the responsibility of the government's HR department. However, when the Ecofiscal Commission, a think tank dedicated to finding viable strategies to transition to a low carbon economy, found that uptake by senior public servants lagged, the Energy and Economy team challenged assumptions about the limits of philanthropy and crafted a pilot funding stream to help train civil servants on this new opportunity.



**To be effective,  
you must be  
~~hands on.~~  
*on-hand.***

**In building the fire  
of reconciliation, the  
most important role for  
settlers is to be on hand,  
ready to gather wood.**

▲  
Initially there seemed to be a lot of alignment between SiG, 4Rs, Apathy is Boring and other graduates of the GradSI program about a shared Reconciliation initiative. It eventually became clear, however, that the most important role for a settler organization like SiG was not to lead, but to be on hand and ready to support Indigenous leaders if they requested help.





*Respectful*

**Conflict**  
~~damages~~ *builds effective*  
**relationships.**

As social creatures, it can be tempting to mitigate conflict whenever possible, but this tactic can make it difficult for parties with different perspectives to have candid and meaningful conversations. Respectful conflict is essential for ensuring that partners can trust in each others' candour and honesty.

▲  
McConnell has worked with HealthCareCAN to explore a partnership to advance the health-related recommendations of the Truth and Reconciliation Commission. McConnell diverged from HealthCareCAN's approach and, at the risk of disappointing their prospective partner, turned down the opportunity as it was presented. Instead of shying away or acquiescing, both parties showed up for an awkward phone call where they stood by their own perspectives, while maintaining respect for each other. From this experience, their relationship evolved to be more open, candid, and constructive, and subsequently they were able to co-develop a new project that reflected the needs of both organizations.

## Nonprofits need good tools, *and* *the right task.*

Without the right tool, even the most important task is impossible. Without the right task, the most well-crafted tool is a no more than a novel gadget. A combination of both, however, is a force with transformative potential.



Over their five-year history, Innoweave has developed a sophisticated suite of tools for creating and measuring impact. The limit of their impact now lies not in the quality of the tools at their disposal, but in their clients' ability to identify which problem to work on. By shifting their focus from tool to task, Innoweave has increased their potential for impact.

**Stick to the  
plan** (if it still  
makes sense).

It takes a lot of work and emotional energy to make a plan, build support around it and put that plan into action. But when evidence mounts that your initiative has poor timing or takes the wrong approach, it's important to find the humility to deviate from your plan and open yourself to emergence.



▲  
After the first few phases of Cities for People, Jorge could see that the initial plan was no longer appropriate for the dynamic context of cities. With advice and support from others in the Foundation, he revisited his approach to the project and let go of the initial plan in favour of a more flexible and emergent strategy. This flexibility allowed him to design interventions that actually supported the needs of stakeholders such as the Boston Study Tour and the Kids and Place Lab. This new strategy strengthened their coalition and helped them create a more resilient and inclusive program.



~~Criticism is  
bad for you.~~  
*strengthens*

Journalists asking hard questions like “so what?”, “who cares?” and “how can you prove it?” may seem threatening to an organization experimenting with untested ideas. But these questions can strengthen a foundation’s rigour and prepare its communications for a discerning public audience.

▲  
In an effort to better understand the burgeoning field of Solutions Journalism, McConnell contracted several journalists to tackle issues important to the foundation’s initiatives and grantees, and also to report on the work McConnell was doing. This process, which required McConnell to loosen control over its message, taught the communications team that hard questions from outsiders actually strengthen the foundation’s understanding of its programs and grants, and help form more compelling and credible stories to share with the public.



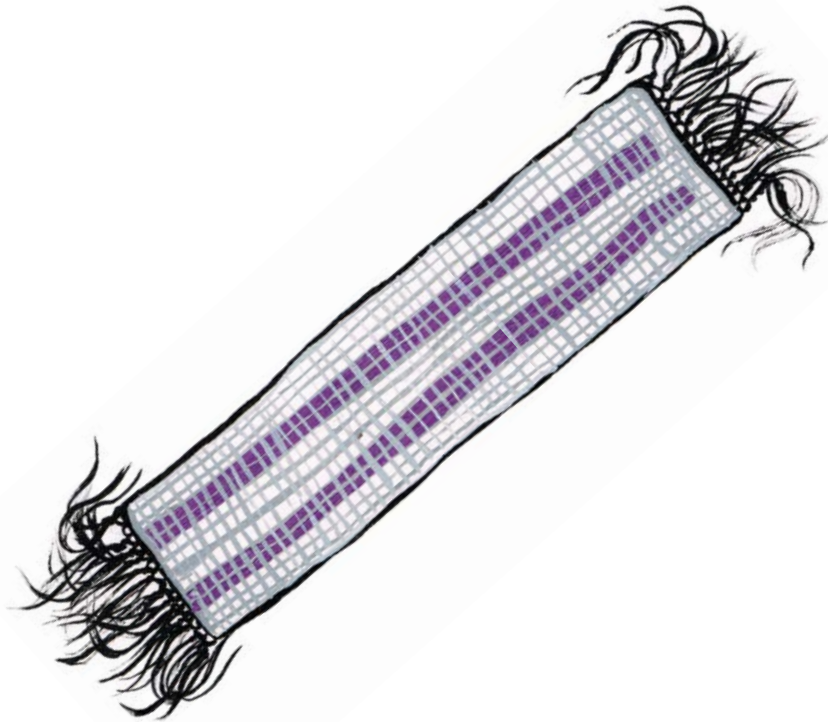
## Communities need solutions.

↑ (their own)

**Changemakers have a natural tendency to offer novel and concrete solutions to problems they encounter. However, some people may not want their problems solved for them—they would rather be heard, understood and supported as they find their own way.**

▲  
After a year of implementing the WellAhead initiative in British Columbia, the team realized that despite their best intentions to support school districts in creating their own path to integrating wellbeing, they had become yet another organization pushing a particular solution or approach. The unintended negative consequences became clear when two of the six participating districts opted not to continue for a second year. Through this experience, WellAhead learned how to resist the urge to intervene with a solution, and instead focus on building capacity for others to address their own issues.





## Reconciliation is a project for Indigenous people, *and settlers alike.*

The negative ramifications of French and British colonization of Turtle Island were experienced almost entirely by Indigenous people. This, however, does not mean that reconciliation is a project only for Indigenous people. Colonialism is a sickness of our whole society, and reconciliation is medicine: for Indigenous people and settlers alike.

▲  
When Stephen visited the Winnipeg Boldness project for a ceremony to renew funding for its second year, he and the Foundation's partners—the Government of Manitoba and United Way Winnipeg—were honoured with a medicine song by a member of the Buffalo Gals. The song, whose central message translates to “The River We Are Paddling is the River Within,” and a subsequent conversation with the musician, reminded Stephen that reconciliation is much more than a project to amend past injustices against Indigenous people: it is medicine to heal all members of a society that is ill from its history.



## Share your *(lack of)* knowledge with others.

In a culture that expects institutions to “know things,” it can feel unprofessional for foundations to engage publicly in the messy business of prototyping and collaborative design. However, subverting these expectations by inviting others to engage and test hypotheses can generate valuable input, encourage constructive critique and strengthen community.

▲  
During the development of Nourish, a new McConnell project dedicated to elevating the role of food in patient care, the program team had many untested ideas. Rather than reverting to the conventional process of testing these ideas privately before announcing the plan, the Nourish team hosted a “Network Weaving Webinar” where they invited their stakeholders to share ideas and reactions. Not only did this process yield meaningful insight, it also built trust and buy-in before the program launch.



**Some systems dynamics are too formidable to challenge.** *↑ not*

There are examples of small innovations being brought to scale, but new approaches are often limited by the structural forces that maintain the status quo. Transformational change often requires the dismantling of structures that maintain the current system, no matter how daunting that process may be.

▲  
During its first year, RECODE supported experimentation by a number of universities and colleges. This strategy, which was designed to generate insights about the innovation capacity of the post-secondary education system, carried an implicit assumption that higher-order structural transformation—including elements such as the tenure-based incentive structure—would be out of reach. However, after witnessing several successful RECODE initiatives struggle to scale or maintain momentum in the face of systemic barriers, Chad and the RECODE team began to challenge their assumption that these systemic barriers were too formidable to challenge. Instead, they started asking: “are they too formidable not to challenge?”



**Trust emerges  
when power is  
shared.** *and vision*

**Devolving decision-making power is a necessary component of building trust and shared ownership across diverse coalitions, but it is not enough. A well-defined and clearly communicated vision is also essential.**

▲  
Thanks to its familiar name and active granting program in Montreal, McConnell often holds considerable influence in its partnerships and coalitions. Recognizing this dynamic, and acknowledging the importance of distributed ownership in building a movement, McConnell helped establish a decentralized secretariat to steward and implement the Amplifier Montreal vision. This approach, however, fell short of its promise to build partners' trust and shared ownership because the incubation phase within McConnell was too short to develop a refined vision that others could understand and get behind.

# 12 Lessons Learned

*A visual reflection on a year of learning about philanthropy and social innovation by the J.W. McConnell Family Foundation.*

# 2016



# 12 Lessons 2016

Between 2015 and 2016, McConnell reviewed and revised its philanthropic theory and practice. It became clear that being a *learning organization* was key to the foundation’s identity and ability to have a positive impact in the social sector. Concurrently, in conversations with numerous stakeholders, staff discovered that many saw the foundation as a “black box” — collecting insights into social innovation and social finance, but rarely sharing them publicly. 12 Lessons was conceived as a project that would rectify this, by closely examining what had been learned during a year of grantmaking, impact investing, convening and other activities, and asking: what worked, what didn’t, and why?

# 1

The performance of a system is not evaluated by its parts but by the nature of their interactions.

# 2

Go for walks with your colleagues.

# 3

Social Innovation has a broad definition, and that's a good thing.

# 4

Measuring impact is hard, and that is exactly why it is valuable.

# 5

“Innovation isn't always about creating new things. Innovation sometimes involves looking back at our old ways and bringing them forward to [a] new situation.”

- JUSTICE MURRAY SINCLAIR

# 6

GEPO: good enough, push on.

# 7

Local roots deepen the value of international networks.

# 8

Spend time in the spaces where the system lives.

# 9

Pay attention to politics: different governments require different strategies.

# 10

Collaboration ≠ everyone being an author.

# 11

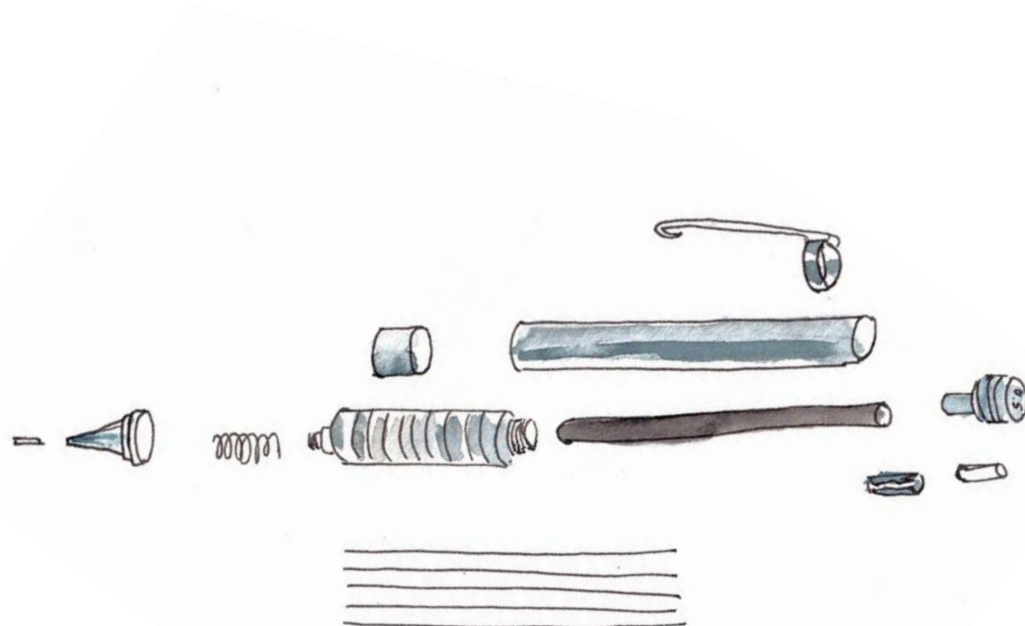
Take time to do things well.

# 12

Equip your imagination with every tool at your disposal.

The performance of a system is not evaluated by its parts but by the nature of their interactions.

While it may be possible to take the best components from every automobile available - the radiator of a Mercedes, the carburetor of a Lamborghini, and so on - and assemble them, you will fail to create an automobile, let alone the best one, because the parts will not fit together. It's not so much the quality of the parts, but the way they integrate that matters. To maximize impact, a foundation must consider not just the individual components - grantees, projects, and initiatives - but the way the components interact with one another, and with the outside world.



▲  
In August 2015, the Foundation convened its staff and Board to study the organization and define a new Theory of Philanthropy that would underpin the Foundation's work. Equipped with the theories outlined in Patton, Foote, and Radner's book - A Foundation's Theory of Philanthropy: What It Is, What It Provides, How to Do It - the team found that the process was rich with learnings about the relationship between the whole and the sum of its parts.

## Go for walks with your colleagues.

**Engage with colleagues outside of office routines, as it creates space to connect as people, take pleasure in the natural world, and address thorny issues. This becomes especially powerful when the walks' participants cut across hierarchies as it builds trust and understanding throughout the organization.**



▲  
June 2015 brought warmer weather, and with it, more participants in “John’s Walks”: the semi-regular treks up Montreal’s Mount Royal where colleagues stretch their minds, express their personalities, and develop another dimension to their relationships.



## Social Innovation has a broad definition, and that's a good thing.

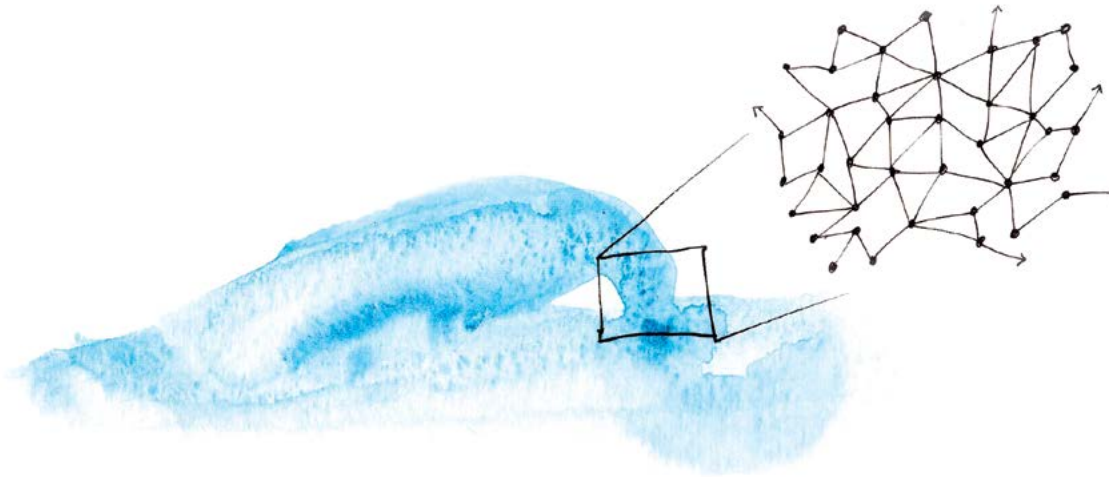
The only commonly understood characteristics of “Social Innovation” are that it is unconventional and that it creates impact. While this broad definition might fail to conjure a clear image of what social innovation is, it does free the social innovator to focus on intended impact and pursue solutions in whatever form suits the context.



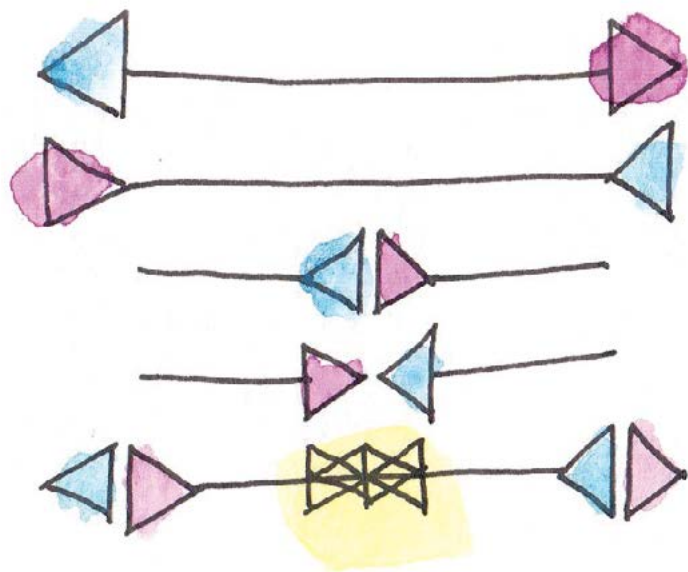
▲  
In September 2015, Innoweave marked its third anniversary by reflecting on what has been learned after helping over 300 organizations define their impact. The diverse cohort represents a multitude of approaches and intended impacts, and, taken together, has revealed that trying to rigidly define “Social Innovation” is not only difficult, it is counterproductive, as it confines our imagination to existing solutions.

## Measuring impact is hard, and that is exactly why it is valuable.

**Be rigorous in reporting and measuring impact, as the process will reveal its value twice. First, in the conversations, relationships, and insights that emerge from asking hard questions, and again with the metrics themselves.**



In October, RECODE launched the “Impact Reporting Platform” and encouraged RECODE grantees to share real-time data about their success in providing social innovation and entrepreneurship opportunities for post-secondary students. It was a rigorous effort that leveraged best practices and engaged top experts in the field. Ultimately, the effort gave the RECODE team an appreciation both for how difficult it is to measure impact in complex systems, and how valuable measurement is as a tool to encourage grantees to communicate with the foundation, connect with adjacent projects, and think critically about their activities.



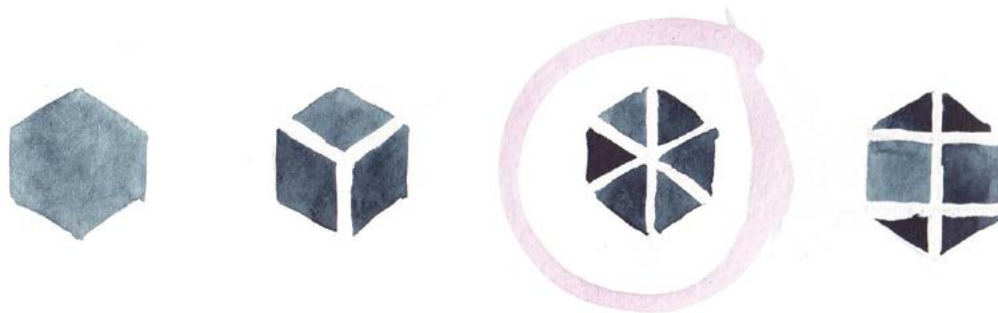
**“Innovation isn’t always about creating new things. Innovation sometimes involves looking back at our old ways and bringing them forward to [a] new situation.”**

— JUSTICE MURRAY SINCLAIR

▲  
In November 2015, the first Indigenous Innovation Summit in Winnipeg, MB convened a country-wide selection of social innovators: public and private sector leaders, youth and elders, Indigenous and settlers. The unusual assortment of innovators and unique conversations upended many assumptions about the nature of innovation: notably, the assumption that innovations are necessarily ‘new’.

## GEPO: good enough, push on.

**Perfectionism is the antithesis of innovation. The process of innovation, or doing something that has not yet been done, requires comfort with stepping into the unknown. This means that theorists must also be practitioners who prototype their theories to test how they stand up in the real world. Imagining and trying form the two components of innovation, and GEPO is their bridge.**



▲  
In November, 2015, SiG honoured Brenda Zimmerman - a great friend and systems change scholar who passed in 2014 - by publishing Gedenkschrift. The writing process gave those who knew and loved Brenda an opportunity to reflect on a life replete with wisdom about living well and changing systems. One of these lessons was GEPO.





## Local roots deepen the value of international networks.

**Develop philanthropic models that are deeply rooted in your local community, then exchange your insights with experts from around the world. This approach will give you a wealth of experience and perspective to situate your new learnings and reveal surprising connections that transcend borders.**

▲  
After months of experimentation in their backyard of Montreal, the Foundation gathered the Amplifier Montreal team and visited London, England and Bilbao, Spain, to share experiences in civic innovation and building resilient cities. Prior to this trip, Amplifier Montreal gave the Foundation an opportunity to deepen its philanthropic roots in Montreal, enabling them to gain from an exchange of ideas with international partners.



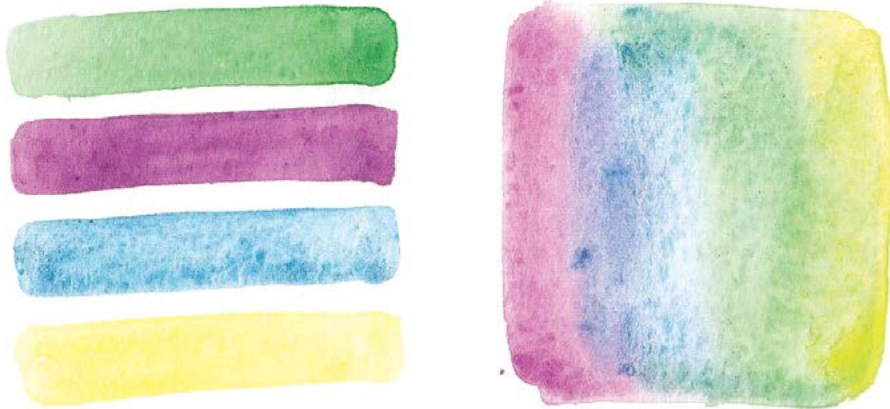
## Spend time in the spaces where the system lives.

**Systems are complex, making those trying to change them prone to feeling alienated and disoriented by the abstract version that lives in spreadsheets and inboxes. Spend time in the physical spaces of the system you are trying to change because it will ground the abstract, ward off isolation, and provide a wellspring of motivation when the work feels daunting.**

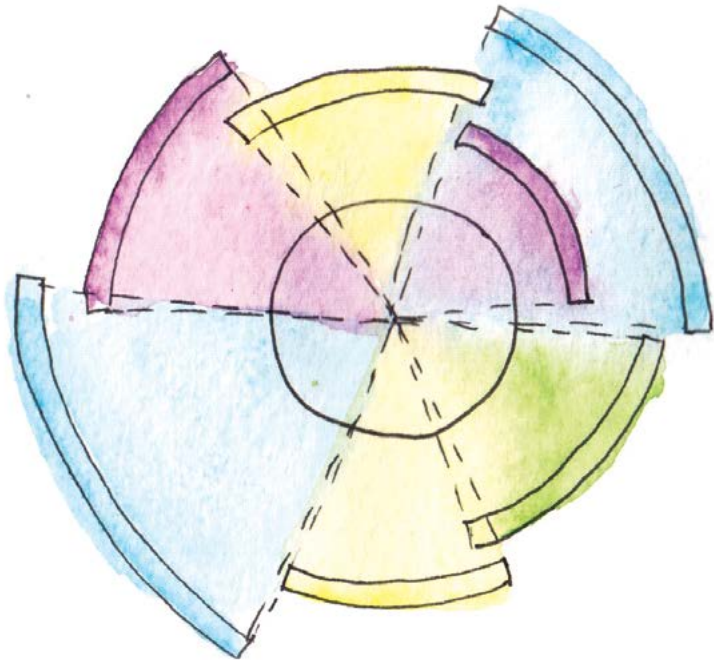
▲  
In January 2016, the McConnell Foundation's Sustainable Food Systems initiative invited the Institutional Food Program grantees to Guelph to meet other grantees and visit demonstration sites where food systems work is evident. The mood was energetic as the grantees and Foundation staff interacted with real-world versions of their often all-too complex and abstract work.

## Pay attention to politics: different governments require different strategies.

**Understand politics from a non-partisan perspective. Politics influences social systems, and innovative foundations will enhance their capacity for change by understanding the challenges and opportunities presented by new political contexts.**



▲  
In February 2016, Foundation staff travelled to Ottawa with “CEGN Low Carbon Funders on the Hill”, to host a series of meetings between low-carbon funders and political staff in order to better understand their priorities and discuss collaboration. With the recently elected Liberal majority, the group discovered a very new political landscape, and were reminded of the all-encompassing influence politics has on strategic philanthropy. This experience drew into sharp focus the importance of aligning a foundation’s strategy with the political context in order to seize new opportunities and mitigate new challenges.



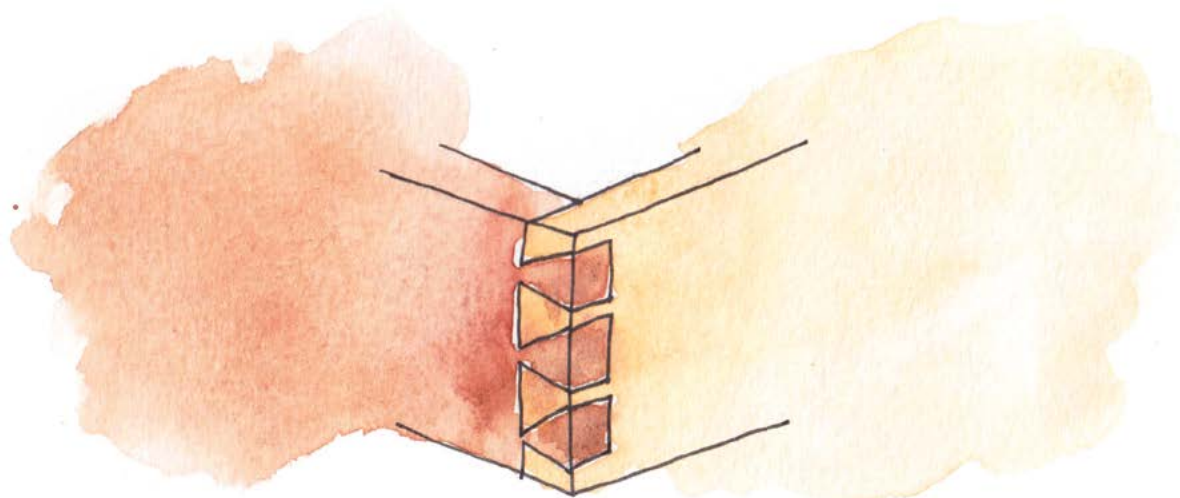
## Collaboration ≠ everyone being an author.

**There is a cruel paradox in decentralized organizing: the more diverse a collaboration is, the more it requires a clear vision, yet the more difficult it becomes to define and articulate one. An author in this paradox must approach diverse perspectives with curiosity, empathy, and a learning spirit but always remember that their primary duty is to serve the collective vision that exists between and around the group's many perspectives.**

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March 2015 marked the culmination of 18 months of discovery and experimentation in the Cities for People project and the launch of its Experimental Phase Report that explores new ideas and promising approaches to creating sustainable, innovative and resilient cities. Cities for People was an experiment in decentralization, rich in lessons about how to create and express a collaborative vision.

## Take time to do things well.

**Philanthropy that bridges settler and indigenous institutions under the shadow of Canada's colonial history is fundamentally different than any other kind. Colonial histories, power differences, and diverse cultural paradigms require that all partners bring attention, respect, empathy, and patience. In this difficult and important work, it is worth leaving behind expectations of timelines and proper process, and take the time to do things in a good way; a way that not only allows the project to succeed, but contributes to respectful relationships and new partnerships.**



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It had been several months since the WellAhead education initiative had been implemented in several pilot jurisdictions and there appeared to be a discrepancy between the early success of most jurisdictions, and the experience of the Nisga'a nation in British Columbia where progress appeared stalled. In April 2016, a McConnell leadership team traveled to Nisga'a to offer respect and friendship, learn about their Nation, and understand their experience with WellAhead. The delegation left behind their assumptions about proper process, and learned a great lesson about timelines, time, and doing things in a good way.



## Equip your imagination with every tool at your disposal.

**A foundation has many tools available to it, including “traditional tools” like granting, and “new tools” like impact investing. While each tool is appropriate for achieving different outcomes, there is untold potential awaiting those who experiment, remix, and re-combine the familiar with the new.**



▲  
In May 2016, the Foundation culminated seven years of learning, research and experimentation to announce its new approach to impact investing: Solutions Finance. Impact investing comes with a lot of fanfare, and McConnell approached this new tool not only with enthusiasm but also restraint, learning that the true promise of new tools lies in how they work with and enhance familiar ones.