

# **The Dandelion Wager:** Scaling Social Impact by Winding Up and Giving it All Away

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Prepared for  
Calgary Reads and Chevron Canada  
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The Institute for Community Prosperity connects students with social impact learning through applied, community-partnered research, creative knowledge mobilization, and systems-focused education. The Institute is interested in big questions about how we invest in social purpose or the common good in the 21st century, and in chronicling real-world examples that sit at the nexus of knowledge and action, at the nexus of systems thinking and social problems. James Stauch is the Director of the Institute, and Cordelia Snowdon-Lawley, Changemaking and Community Research Strategist, is a recent MRU graduate (BA, Policy Studies, Diploma, Social Work), and former Catamount Fellow.



Calgary Reads is a nonprofit organization with two decades of experience serving the Calgary community through a focus on early literacy. Calgary Reads' approach has been strongly informed by the evidence-backed importance of 'reading for pleasure,' following evolving practice in the science of reading literature.



2023 marks Chevron Canada's 85th Anniversary of continuous upstream operations. Headquartered in Calgary, Alberta, Chevron Canada has interests in oil sands projects and liquids-rich shale gas acreage in Alberta; exploration, development and production projects offshore Newfoundland and Labrador; and exploration and discovered resource interests in the Beaufort Sea region of the Northwest Territories. Chevron Canada focuses on community investment programs that contribute to sustainable outcomes in the following areas: education, economic development, health and community.



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Photo credit: James Stauch

# Introduction

This report serves as the groundwork for a social innovation<sup>1</sup> case study of a nonprofit ending its organizational lifespan, and in so doing aiming to scale the impact of its work through strategic transfers of programs and assets to other organizations. This case study tracks the experience of an organization focused on promoting early literacy - Calgary Reads - in undertaking a carefully planned dissolution (also referred to as termination) process, centred on gifting programs, activities, knowledge and learning to other entities, including local and national nonprofits as well as academic institutions. This process contains many insights for other organizations, as well as for funders and researchers.

There is an opportunity here to not just chronicle the dissolution of a cherished community organization, but more importantly - and of particular interest to a broader community of social impact practitioners and researchers - it is an opportunity to chronicle how one organization's legacy can 'live on' in other forms and have the potential to paradoxically scale.

Calgary Reads, a well-recognized nonprofit organization advocating for early childhood literacy over the past two decades, recently wound down its operations and transferred its programs, knowledge and 'legacy' components to seven other organizations via a process called the 'Dandelion Strategy.' Calgary Reads ceased operating in early 2023 and voluntarily revoke its charitable status in summer 2023.

The aim of the Dandelion Strategy is not just to continue to maintain impact in the community beyond the life of Calgary Reads, but also to actually scale that impact<sup>2</sup> for each seed to grow into a fully fledged organism of its own. A radical way to ramp up impact through paradoxically winding an organization down.

In the wake of the global COVID-19 pandemic and a decades-long growing structural *social deficit*,<sup>3</sup> many nonprofit organizations have closed their doors, scaled back their operations, or amalgamated with other nonprofit organizations through mergers or acquisitions. Such measures appear to be particularly prevalent in Alberta, where there is much less government financial support for the sector than in the past.<sup>4</sup> As Bruce MacDonald, the head of Imagine Canada, the country's national advocacy voice for charities notes, "many organizations are still in a place of 'How are we going to survive?'"<sup>5</sup>

While there are resources and literature around the termination of a nonprofit organization, typically focusing on the legal or financial aspects of dissolution, there are far fewer insights into creating a legacy for impact in conjunction with dissolution. Similarly, most insights around scaling assume the main entity will continue to live on and evolve, not close up shop. We hope, therefore, that this report is useful to those considering novel ways to scale their impact. This process also represents a unique opportunity to fill a social research and development (social R&D) knowledge gap. Please note, however, that this report is not intended as a guide to nonprofit termination.

# The Dandelion Strategy in Brief

**“How might we nurture a rich literacy ecosystem that ensures all children have access to fun, safe, and inspiring opportunities to discover and embrace the joy of reading?”**

Dandelion Seed Partners (convening question for the Seed Partners’ journey)

**“The dandelion is our strategy to address succession, sustainability and scale. Community change efforts need to be dynamic and sustainability doesn’t always have to mean preserving the current form. Our goal is a more equitable and resilient future for young readers, but also distributed leadership - new partners who will own this great challenge, work in new ways, and collaborate, strategically, to redesign the systems that must work better to support children.”<sup>7</sup>**

Stacey Pinney, Founder and CEO, Calgary Reads

The Dandelion Strategy - branded as such by Calgary Reads itself - is premised on a simple, though counterintuitive question: What if we actually scale our impact by going out of business? Calgary Reads’ decision to close was not motivated by financial necessity. In fact, the organization was in as healthy a financial position as it had been for most of the previous decade. Upon dissolution it even created a legacy endowment for literacy with its surplus at the Calgary Foundation. Nor was it a result of the pandemic, which otherwise did appear to be an important factor in (arguably) the first mini-wave of mergers and acquisitions ever witnessed in the nonprofit sector.

Instead, the decision to dissolve was the result of an internal strategic wager; Calgary Reads’ leadership came to the conclusion that there might be a greater possibility for reach and impact if the programs and models that the organization had prototyped could be scaled by larger or more established organizations. This strategy is an adaptation of the ‘bees and trees’ notion of scaling sometimes referenced in the innovation literature (both commercial and social innovation). The bees in this metaphor are the pollinators (very much like the original dandelion) and the trees are the established receptors, with strong roots, and proven ability to scale, but often less mobile or nimble when it comes to ideating, prototyping, and testing new approaches.<sup>6</sup>

The Dandelion Strategy was adopted after exploring the possibility of a pivot to a different leadership mode, as well as different organization change models, including mergers with other nonprofit groups or being acquired by a national nonprofit. The latter path - acquisition - was explored in some considerable detail with one organization in particular - United for Literacy, one of the legacy partners in the Dandelion Strategy. But the Dandelion Strategy was ultimately selected as the path worth pursuing.

## Our Case Study Approach

The Institute for Community Prosperity was asked to document the implementation of the Dandelion Strategy, from shortly before the strategy was announced until Calgary Reads officially wound down, implementation had started, and the Seed Partners had concluded their first year meeting as a group. The case study is meant to inform project protagonists, funders, the broader community of early childhood literacy practitioners, other nonprofits, those studying or otherwise interested in social innovation, and the general public.

Although this can be considered a case study, broadly speaking, we are not intending this to follow the conventions and parameters of a business school-style case study. This report chronicles Calgary Reads’ journey from an operating nonprofit through dissolution, focusing on the transfer of legacy programs and knowledge and branding assets. As part of this, we examined the rationale and origins of the legacy transfer concept, the progress to date, the potential to scale impact through strategic transfers and post-dissolution activities, and lessons learned along the way.

In Phase 1 of this study, the Institute engaged in a round of 20 conversations with participants and external stakeholders, including legacy partners and those in the broader childhood literacy or philanthropic space, while also consulting both academic and non-academic literature on the topic of nonprofit mergers, dissolution, and early-literacy strategies. In Phase 2, we engaged in an additional round of 20 conversations, which included 9 of the original participants, as well as 11 additional stakeholders.

The methodology is described in more detail in Appendix A: Methodology.



# The Context

Before recounting the Dandelion Strategy in detail, it is useful to first provide some context on Calgary Reads' reason for being. Why is reading and early literacy important, and how has early literacy evolved and been invested in (or, more to the point, underinvested in) at a national, provincial and local scale? We hope that this context is also useful as background for the Literacy Lab beginning in 2024, described in more detail later in this report.

## Reading and Early Literacy (A Quick Primer)

Reading is the process by which humans make meaning of letters and symbols.<sup>8</sup> As children learn to read, in addition to visual and tactile inputs, hearing is also an important tool, creating phonological awareness. The media of reading, whether it be printed books or documents, braille texts, maps, signs, electronic devices or many other media, is created through some form of writing, design, or both. The practice (and ultimately mastery) of reading and writing is collectively referred to as 'literacy'. Alberta Education defines literacy as "the ability, confidence and willingness to engage with language to acquire, construct and communicate meaning in all aspects of daily living,"<sup>9</sup> while the International Literacy Association refers to literacy as "the ability to ... communicate using visual, audible, and digital materials".<sup>10</sup> As such, it is a form of human-technology interface, which in turn implies that there are many sub-variants of literacy - data literacy, media literacy, cartographic literacy, and so on. Even quantitative literacy - also called "numeracy" - is often referred to as fundamentally a form of literacy, as it meets the same general criterion of making meaning from symbols.

Understandings of the function and importance of literacy have evolved over hundreds of years. For example, in an earlier epoch, literacy was viewed as binary (you either could read and write, or you could not - the measure typically not going far beyond the ability to spell your own name). Moreover, its development was seen as the more-or-less exclusive purview of the school system. Over the last few decades, this binary approach has withered, also as the social and cultural aspects of reading and writing have come to be understood as just as important as the technical (and more easily measurable) aspects.

Literacy levels have been strongly correlated to levels of economic development, and literacy is viewed as a core 21st century skill.<sup>11</sup> Literacy is included as a cornerstone of United Nations Sustainable Development Goal (UN SDGs) 4: To "ensure inclusive and equitable quality education and promote lifelong learning opportunities for all". Target 4.6 of the UN SDGs aims, by 2030, to "ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy."<sup>12</sup> Despite this global target, Canada has struggled historically with functional illiteracy,<sup>13</sup> which has numerous definitions, but is essentially the level of literacy required to navigate daily life, most workplaces, and basic civic participation. As a recent Canada West Foundation study noted, nearly half of working-age Albertans lack the literacy skills that most jobs require, adding "at a time when workers face harder problems and require higher literacy levels, the proportion of adults with adequate skills, including those aged 16-25, has fallen over time."<sup>14</sup>

Literacy for most people, for much of human history, was a concept and reality either inconceivable or completely out of reach. While the Gutenberg printing press began a centuries-long acceleration of literacy among the masses, in Canada it was not until the early 20th century that reading was actively promoted from a more child-centred perspective, i.e. for the pleasure of reading.<sup>15</sup>

Reading for pleasure has numerous cognitive benefits at all stages of the life cycle, though with pronounced effects early on. It leads to an expanded vocabulary and imaginative capacity, as well as the ability to memorize, focus and comprehend mathematics, leading in turn to better overall academic achievement (and all of the economic and health benefits that flow from that).<sup>16</sup> And this process starts early. As researchers at the University of Calgary note, “we know that babies who hear more words, speak more words and who hear more complex language produce more complex language later in childhood. These language skills help children get ready to read.”<sup>17</sup>

The Center on the Developing Child at Harvard University notes that during the first three years of life, brains are forming more than a million new neural connections per second.<sup>18</sup> Building brain architecture at this early stage - the maximum plasticity phase of brain development - provides a framework foundation for learning that in turn plays a critical role in shaping future health, and ultimately strong communities. Dr. Judy Cameron, a Council member of the Harvard-based National Scientific Council on the Developing Child, notes that there is a strong correlation between high socio-economic status and early childhood vocabulary (which, incidentally, is also a positive feedback loop – high status enables great resources, and a lot of individual attention devoted to early childhood development).<sup>19</sup> Attentive adults who read with, talk to, and engage a child in rich conversation greatly help develop the child’s neural circuits for reading, visual symbolism, association, reasoning, and other connections essential to higher order cognition, reasoning, logic, and problem-solving.

As such, investments in early literacy, in particular in reading for pleasure and one-to-one adult-child reading-based interaction, have an extraordinary social and economic return. James Heckman, who shared the Nobel Prize in Economics in 2000, argued forcefully for the strong Return-On-Investment (ROI) of early childhood investments on pure economic prosperity grounds. In fact, multiple disparate disciplines - including neuroscience, developmental psychology, economics, and early childhood education - have all come to similar conclusions around the value of early literacy. This is a relatively rare example of “consilience”, a critical validation concept within social research and development, or *social R&D* (i.e. this level of convergence leads to a high level of confidence that such investments pay positive social dividends).

The Early Intervention Foundation, a UK-based “What Works Network” centre of evidence aggregation and dissemination, notes that in addition to a nurturing home environment, the most critical early intervention tied to later success in life is a “focus on parents talking with their children more, sharing books, and simply discussing day-to-day goings-on, even from a young age.”<sup>20</sup> Conversely, if students lack proficiency in reading by the end of grade three, it seems clear from the literature that they will encounter significant obstacles for the rest of their educational journey.<sup>21</sup> Alarming, many jurisdictions fail to test for early reading or literacy skills.<sup>22</sup> Alberta now tests for early literacy, but does not make these test results public.<sup>23</sup>

The COVID-19 pandemic and the Black Lives Matter movement have raised collective awareness of the systemic inequities in reading comprehension. As a recent article in the Stanford Social Innovation Review pointed out, “children of color, from underserved communities, and those who face learning challenges, have always been subject to a persistent gap in reading outcomes relative to white and more affluent peers, a systemic failure...”<sup>24</sup> Recognition of these inequities is not new, underscoring the many social and philanthropic innovations over the past half century to redress this. Notable highlights include Sesame Street, a program of the Children’s Television Workshop financed by the Carnegie Corporation and Ford Foundation, and Head Start, which came from US President Lyndon Johnson’s Great Society initiative and integrates (though is not based on) an emphasis on early literacy.<sup>25</sup> Programs that are expressly designed for early childhood reading involving one-on-one interaction show very strong efficacy, such as Stepping Stones to Literacy, which, according to one meta-analysis, has an extraordinary 1:17 cost-benefit ratio.<sup>26</sup> There is also a large body of evidence that reading in print is advantageous for learning and neurodevelopment compared to reading online materials, particularly for young people.<sup>27</sup>





# Early Childhood Literacy in Canada

While Canada makes some of the largest collective investments in education of any Organisation for Economic Co-operation and Development (OECD) country, according to the most recent *Progress in International Reading and Literacy Study* (PIRLS), Canada placed only 23rd globally in fourth grade reading achievement.<sup>28</sup> Canada's public investment in early childhood literacy has not caught up to research or practice insights. At a federal level, there is an acknowledgement of a national interest in early learning opportunities, especially in the context of economic and social development. However, the vast majority of the federal government's focus and money over the past few years has been on building access and equity in child care. This unfortunately came on the heels of the Canadian Literacy and Learning Network ceasing operations in 2015.<sup>29</sup>

Governmental approaches to early childhood literacy suffer from jurisdictional and ministerial scope limitations. Provincial governments are constitutionally responsible for education, yet this tends to bifurcate into K-12 and advanced/post-secondary, with pre-Kindergarten learning usually falls to areas of government tasked with social services, or is simply sloughed off as the responsibility of parents. So what should be universal often tends to focus only on the vulnerable or marginalized, and as such early literacy can easily be clinicized or niche-programmatized, and almost always under-resourced relative to resources for school-aged and post-secondary-aged learning.<sup>30</sup> Municipal governments often help fill gaps through the public library system, public health clinics, and neighbourhood or recreation hubs, but there are real limits - and often outright opposition - to municipalities' embracing learning and education within their mandates.

The brightest spot in early childhood literacy in Canada may be in the philanthropic space: A number of philanthropic entities in Canada - including the Palix, Chagnon, Muttart, Lawson, Lyle S. Hallman, and Margaret and Wallace McCain Foundations - have helped underwrite research, experimentation and the development of new and promising approaches to early childhood literacy. In fact, there is even an Early Childhood Affinity Group under the umbrella of Philanthropic Foundations Canada, operating as a peer-learning group of grantmakers and community investment professionals.<sup>31</sup> United Way campaigns, community foundations, and the corporate sector have all contributed substantially to this space as well.

Back in 2009, the Canadian Language and Literacy Research Network, which connects 165 researchers at 37 institutions, produced a *National Strategy for Early Childhood Literacy*. The report highlighted the significant losses to the Canadian economy from poor functional adult literacy (42% of Canadians), a problem which in turn is rooted in the early years.<sup>32</sup> The Strategy noted that the "language and literacy environment of the child's home and early learning and child care (ELCC) settings are strong determinants of early language and literacy skills", and that 1 in 4 children entering Kindergarten were significantly behind because of the inadequacy of such environments in the home. This number mirrors the US figure.<sup>33</sup> The Strategy identified four key systemic barriers:

1. The inability of many Canadian children to access high-quality early childhood education and care programs.
2. The inability of many Canadian children to access libraries, and other supporting programs and services.
3. The inability of many Canadian schools to identify and deal effectively with children who already lag behind their peers when they first enter school.
4. The need to improve teacher preparation in the area of reading development and reading instruction in Canadian classrooms.<sup>34</sup>

The 2020 Fall Economic Statement announced the creation of a Federal Secretariat on Early Learning and Child Care "to build capacity within the government and engage stakeholders to provide child care policy analysis to support a Canada-wide Early Learning and Child Care (ELCC) system."<sup>35</sup> The centrepiece of this, of course, is the universal subsidised daycare program, announced in 2021 with a \$30 billion commitment over five years, and a \$9.2 billion commitment annually thereafter. While this infrastructure - though slow to roll out - almost certainly will help early childhood development broadly speaking, it is unclear how much emphasis will be placed on literacy within this context. Worryingly, a study by the Canadian Children's Literacy Foundation revealed that less than half of daycare workers engage children in daily early literacy activities.<sup>36</sup> The most recent *National Progress Report on Early Learning and Child Care* (2018 to 2019) barely mentioned literacy.<sup>37</sup> Neither the 2017 *Multilateral Early Learning and Childcare Framework*<sup>38</sup> nor the 2018 *Indigenous Early Learning and Childcare Framework*<sup>39</sup> mention literacy at all.





*We Raise Tomorrow: An Alberta Approach to Early Childhood Development*, which unfortunately only mentioned literacy twice - a classic example of how literacy can be buried as a priority under pressing socio-economic needs like poverty, nutrition, and abuse prevention.<sup>45</sup>

Alberta students, long known for performing higher than the Canadian average on a regular basis in the Program for International Student Assessment (PISA) rankings, have in the last two decades seen a narrowing of that gap.<sup>46</sup> A 2014 study of 87,000 kindergarten-aged kids revealed that Alberta children were below the Canadian norm for early childhood development.<sup>47</sup> The report disclosed that fewer than half of all children had achieved the appropriate milestones in five areas of development measured, suggesting that pre-Kindergarten supports in the province are inadequate. Indeed, the United Way of Calgary and Area notes that less than 50% of kids are developmentally ready for kindergarten.<sup>48</sup>

The Provincial Government promotes literacy almost exclusively for school-aged children through Alberta Education funding and support of Language Arts curriculum, as well as evaluating multiple literacies through a range of subjects. Provincially funded local Family and Community Support Services (FCSS) also allocate dollars to a range of early childhood initiatives, including improving parenting skills and reinforcing positive child and youth development. But they do not typically fund early literacy development.<sup>49</sup>

Community, corporate, and private philanthropy and sponsorship contributes, by far, the most to early childhood literacy investment in Calgary. Local post-secondary institutions - in particular the University of Calgary and Mount Royal University - conduct early literacy research, in part due to the support of the Calgary-based Palix Foundation (formerly Norlien Foundation), which supports the production and dissemination of neuroscience-informed research on childhood development. Palix Foundation, in turn, has worked with the FrameWork Foundation to translate scholarly research into actionable insights for practitioners in many fields, including early literacy work.<sup>50</sup> Numerous conversation participants mentioned the unique niche filled by the Palix Foundation. An important player in Calgary's early childhood literacy research space is Owerko, a University of Calgary-affiliated centre studying child neurodevelopment and mental health, based out of the Alberta Children's Hospital Research Institute (ACHRI). Owerko is one of the legacy partners for the Dandelion Strategy and is described in more detail later in this report.

Of fourteen charitable organizations dedicated primarily to promoting literacy in Alberta, the majority appear to focus on literacy-enhancing programs either in rural communities or outside of Canada.<sup>51</sup> Civil society support for literacy development across Alberta was formerly supported at the provincial level through Literacy Alberta Society and before that through the Alberta Literacy Foundation. Neither organization exists today, nor does the Alberta Reads Network, an initiative started by Calgary Reads. There have been a number of city-wide collective impact initiatives looking at early childhood development holistically and systemically, often including early literacy among other priorities.

## Early Childhood literacy in Alberta and Calgary

Provincially, support for early childhood literacy is tepid and somewhat opaque. Alberta conducts an Early Years Evaluation in Kindergarten, but - uniquely in Canada - the results are not publicly accessible, even in aggregate, so there is no data on which to evaluate progress or compare across jurisdictions or systems.<sup>40</sup> The Province also conducts an annual digital Student Learning Assessment at the Grade 3 level that provides a beginning-of-the-year "check in", but in many respects this is too late (to maximize the opportunity to intervene in this critical neurodevelopmental phase).<sup>41</sup> Last year, due to concerns over pandemic-related learning deficits, Grade 2 literacy was assessed in September 2022, while assessments for Grade 1 students started this year (January, 2023). But while parents can access their child's individual results, and while teachers and administrators can access their class or school results respectively, the results of the Assessment are not made public.<sup>42</sup> Encouragingly, the new Language Arts (ELA) curriculum now mandates reading readiness testing, with publicly available aggregate data, starting in Kindergarten.<sup>43</sup>

The importance of childhood literacy in Calgary was noted as early as 1912-1913, when the early social innovator Alexander Calhoun, through the Calgary Public Library board, sought the appointment of a librarian to visit schools to distribute books and lead a "story-telling" hour in hopes that it would contribute to good reading habits.<sup>44</sup> A century later, following the *Children First Act* in May of 2013, and pursuant to the Province's Social Policy Framework, a public consultation resulted in the summary document *Together*

**“Helping children learn to read by Grade Three is an enormous, critical undertaking—one that needs to be shouldered by all of us. We encourage everyone to keep the reading revolution alive by supporting our partners with books, donations and time.”**

Stacey Pinney, Founder and CEO, Calgary Reads

**“When I actually saw [Calgary Reads’] program in action, I had goosebumps. It’s not just about literacy, it’s about the power of story.”**

Conversation participant

**“A theme throughout for us has been ‘what if’? What if [for example] we turn an old house into an array of reading nooks for children and families?”**

Stacey Pinney, Founder the CEO, Calgary Reads

The Calgary and Area Early Childhood Development coalition, also known as The First 2000 Days Network, was a collaborative effort of community members, organizations, and professionals working toward stronger relationships, behaviour change, and collective action at all levels within the early childhood development (ECD) system. The Network advocated for the adoption of a city-wide strategy, inspired by system-wide collective efforts in Colorado, Detroit, and Winnipeg.<sup>52</sup> Calgary Reads served as the incubator and fiscal agent/host for the First 2000 Days Network, which lasted from 2013 to 2020. The United Way of Calgary and Area and the Province of Alberta (under the then-Ministry of Human Services), enlisting the help of the global firm REOS, convened the *Thrive by 5* Early Learning Innovation Lab between 2014 and 2017. The *Thrive by 5* Lab was premised on imagining Calgary as the “best place in the world for a child to grow up”, which would require transforming the early childhood development (ECD) system.<sup>53</sup> It is unclear what legacy resulted from the *Thrive by 5* process, and the community has not yet witnessed such a transformation take place.<sup>54</sup>

In addition to public, Catholic, charter and private school kindergarten programs, the Calgary Public Library, child care facilities, and certain community or social service agencies also support literacy in the early years. However, Calgary Reads was unique insofar as it was the only organization dedicated principally to this focus.

## Calgary Reads

Calgary Reads was an early literacy organization with two decades of experience serving the Calgary community. Calgary Reads’ approach was strongly informed by the evidence-backed importance of ‘reading for pleasure,’ following evolving practice in the science of reading literature,<sup>55</sup> and contributing to our understanding of literacy by participating in studies on programs to teach reading.<sup>56</sup>

For 22 years, Calgary Reads designed and delivered an innovative array of evidence-based early literacy resources, which are among the most unique in Canada. Calgary Reads’ work was guided by a manifesto that positions childhood reading as rights-based, emphasizes early (pre-school) literacy based on neuro-scientific insights, promotes child ownership of books, and fosters reading as a pleasurable and joyous activity (and in spaces that are fun and imaginative). Calgary Reads also advocated for early reading to be embraced as a community responsibility, not just a parental one. Few other organizations in the country have a comparable approach.<sup>57</sup>

After forming in 2002 with a one-to-one volunteer tutor program for struggling young readers, Calgary Reads incubated a variety of initiatives to enhance the reading lives of children and families. Though a modest-sized organization, Calgary Reads was among the higher profile Calgary-specific non-profit organizations, and easily among the best known and vibrant local brands of those formed within the 21st century. Many Calgarians know the organization by virtue of its eclectic window front in the Kahanoff Centre, the quirky, playful Little Red Reading House in historic Inglewood, or through the annual Big Book Sale.

Calgary Reads’ impact includes 210 schools visited, 360,000 hours read aloud to children, nearly 167,000 books given to children, \$2.6 million raised from 17 years of book sales, and engaging over 24,000 volunteers.<sup>58</sup>



## Calgary Reads was well known for its array of branded programs, including the following:

**Big Book Sale** - The Big Book Sale, Calgary Reads' signature annual fundraising event, has raised over \$3 million through 18 years. Over 8,600 volunteers have contributed over 62,000 hours to the success of the sale. The event has grown to a 10-day high-profile community event, with over 14,000 shoppers and nearly half a million in annual sales in 2022.

**Book Bank** - The Book Bank, until recently located at the Little Red Reading House, has provided over 166,000 books to Calgary children. More than 125 community organizations have received books from the Book Bank, and Book Bank volunteers help stock 80 Little Free Libraries located throughout the City. The Book Bank has also now moved to Shedpoint, a new community co-warehousing facility.

**Community Reading Places** - In addition to the Little Red Reading House (described below), reading nooks have been set up throughout the city, housed within eight existing nonprofit and community spaces. In addition, A Little Red Reading Van enables book distribution and mobile 'pop-up' community reading locations.

**Early Words (formerly Read With Me)** - Early Words is an initiative that provides books to young families at six immunization clinics throughout the city. Nearly 36,000 books have been distributed through over 250 public health nurses who are trained to talk to new parents about the importance of talking and reading. Early Words positions early literacy as an essential part of their child's health.

**Little Red Reading House** - A residence in the inner city community of Inglewood is refurbished as a two-storey reading hub, filled with themed nooks and niches, for children and their families. Nearly 3,400 children have visited the Little Red Reading House since it opened in 2017.

**LENA Start** - LENA Start is an evidence-based program that supports parent-infant conversation-based interaction to improve literacy outcomes. It enables parents to use "talk pedometer" technology to measure their child's language environment, with the aim of improving the quantity and quality of talk at home. This program is licensed from LENA, a US-based nonprofit promoting early talk technology and data-driven programs.<sup>59</sup> Since Calgary Reads adopted the program, 250 families have participated in LENA, with over 2,000 books having been distributed to those families.

**Read Up!** - Read Up! Provides school-based volunteer tutoring with children in Grades One and Two. To date, 165 volunteer tutors have taken part.

**wee read** - wee read is a free online training program that helps parents and volunteers develop and deepen their confidence as reading role models. Nearly 800 caregivers have participated in the program.

Over the past half decade, Calgary Reads has operated with between 10 and 13 employees (the mix of full-time to part-time changing from year-to-year), and with annual revenues and expenses in the range of \$1.3 to \$1.5 million.<sup>60</sup> While its proportion of corporate sponsorship revenue has dropped - like hundreds of other Calgary charities over this same period - it has maintained steady revenue mainly through the pandemic with the support of additional charitable revenue and a modest increase in temporary government support (though government support has been typically no more than about 7-8% of annual revenue, at the top end.) Book sales also dipped as a result of the pandemic.

**"...we dreamed a dream that all children in Calgary could become joyful, confident readers. Over the years, Calgary Reads' one-to-one reading programs, our family readaloud revolution, our Book Bank and our special reading places have given thousands of children a bright start in school and in life. Thank you for being a part of the passionate community of supporters who've championed each child's right to read."**

Calgary Reads' farewell message to the community<sup>61</sup>

# The Dandelion Strategy

As Calgary Reads sunsets as an independent nonprofit organization, the Dandelion Strategy is an attempt to scale its impact through strategic legacy partnerships with several organizations. The intent is to maintain fidelity to the original purpose of these programs - To enhance early literacy among families with young children with a particular focus on families experiencing additional barriers, and to fostering regular interactive reading environments within the household - while allowing for adaptable design and potential re-branding of these legacy programs.

In the summer of 2022, Calgary Reads began transferring its programs, assets, and in some cases human resources to seven 'Dandelion Seed Partners' chosen from among a larger group of potential organizations. These partners include two local nonprofit organizations (Big Sisters and Big Brothers Calgary and YW Calgary), two national organizations (United for Literacy and the Canadian Children's Literacy Foundation), a service club (Rotary), and two universities (University of Calgary and Mount Royal University).

A 'seed release party' was held June 29, 2022, which marked the public announcement and official 'launch' of the Strategy. Following this, a series of workshops involving all of the Seed Partners was facilitated by the Trico Changemakers Studio at Mount Royal University. Through this process, the Seed Partners defined and began to tackle the following question:

**How might we nurture a rich literacy ecosystem that ensures all children have access to fun, safe, and inspiring opportunities to discover and embrace the joy of reading?**

## Pre-Dandelion Strategy: Exploring Options for Continuation and Dissolution

Many nonprofit organizations are currently revisiting their organizational structures, governance, and mandates in profound ways. Some of this is precipitated by the COVID-19 pandemic, now in its third year, which helped usher in rapid digital transformations for some organizations, and which induced either a period of emergency funding or - eventually - shuttering of some nonprofits, particularly those dependent on strong community-based, face-to-face interaction. There has been a discernible uptick in nonprofit organizations exploring mergers or other forms of amalgamation,<sup>62</sup> or resolving to exit the scene entirely. Interestingly, the impetus for Calgary Reads' exit is not principally financial, nor is it pandemic-induced. In fact, in some respects - Big Book Sale revenues, for example - their most recent year has been a banner one. A number of specific forces nevertheless have conspired to lead Calgary Reads to explore a fundamental shift in its organizational structure, longevity and future:

1. The Board's determination that there was no realistic pathway to succession for the founding CEO, Steacy Pinney. A new CEO search might have been conducted, but it was deemed that the compensation required to attract someone of comparable skill set and experience (with a combination of deep and extensive subject matter knowledge, networks integral to fundraising, and branding and public relations savvy) would have been both difficult and costly.
2. Overall community decline in corporate sponsorships and community investment. Despite the rhetorical rise of concern about Environmental and Social Governance (ESG) and "purpose"-driven business, the downturn in the Alberta oil patch from 2015 through 2021 dealt a severe blow to companies' ability to contribute to community initiatives. Calgary Reads' revenue relied heavily on corporate contributions, so while they were largely able to make up the difference in the form of increased philanthropic and emergency government assistance, this structural shift made fund development substantially more challenging.<sup>63</sup>
3. A general recognition that the limits of public awareness and large-scale institutional commitment to early literacy might have been reached within the existing model. As a small nonprofit organization punching above its weight class in terms of communications, it still was not having a strong effect on public policy or large scale public behaviour. In effect, a different model that might hold more promise for scaled impact, was needed.
4. The organization has reflected on its evolution using the Adaptive Cycle, a social innovation mapping tool adapted from ecological science (see figure 1 on the following page).<sup>64</sup> The Adaptive Cycle allows an organization to 'map' itself onto a Möbius loop divided into successive phases that are organizational development analogues of forest succession: Once a mature forest collapses, releasing its stored-up carbon, it goes through a period of re-organization, then new growth, maturity, which then either gets stalled in a 'rigidity trap'<sup>65</sup>, or restarts the cycle through some major process of release, also sometimes called 'creative destruction' (as a forest fire leads to new first-stage plants germinating). As Calgary Reads was deemed to be reaching, or even well into, the 'maturity' phase analogue, some form of 'release' was necessary, be it leadership succession, a major operational or strategic pivot, or a true 'collapse' (in this case an engineered one); winding down, scattering seeds, and germinating those seeds with new players on new planes of activity and potential impact. The Adaptive Cycle mapping tool was also used by the Studio in convening the Seed Partners.



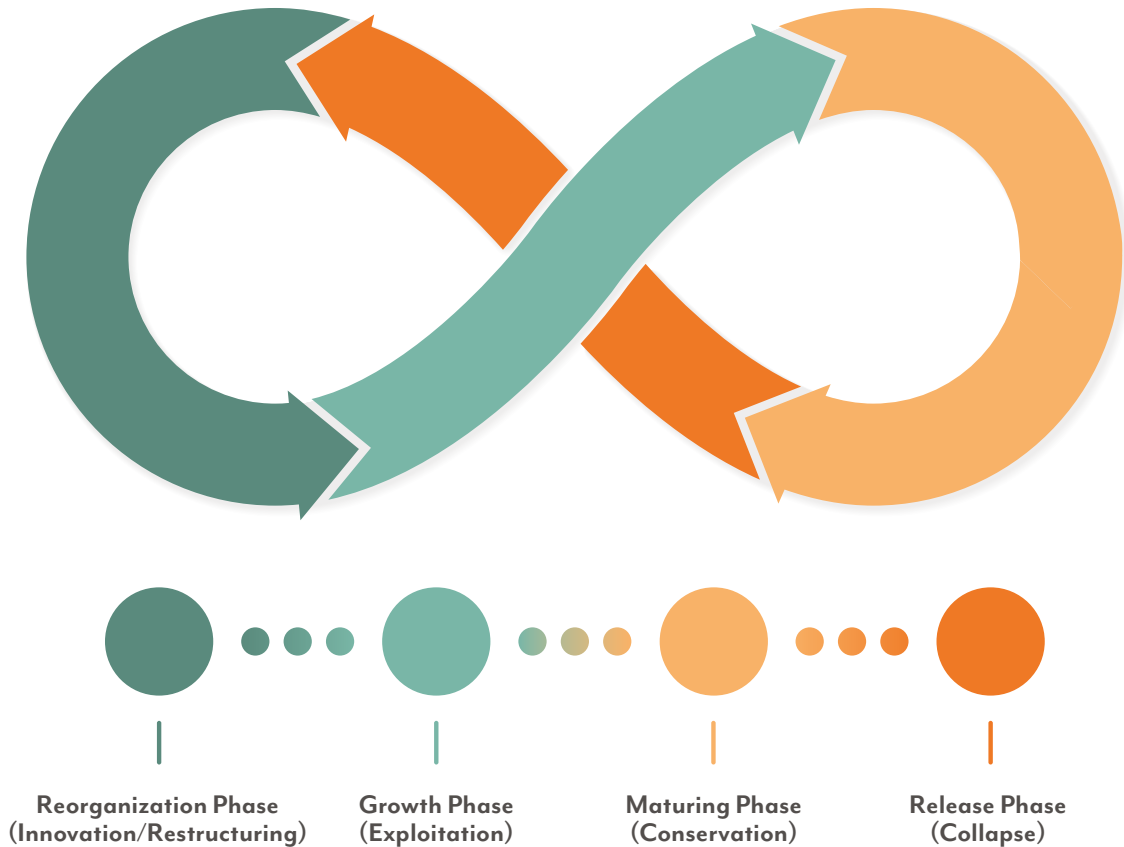


Figure 1: The Adaptive Cycle

Before landing on the Dandelion Strategy as the chosen way forward, Calgary Reads' executive and board explored a number of alternatives. Complete dissolution by winding down operations until virtually no programming or assets remain, while technically an option, was never really viable. Any chosen option had to hold the promise of at minimum maintaining the current level of impact of Calgary Reads, or ideally significantly enhancing impact (i.e. among many more people and/or a larger geography).

Calgary Reads' overall revenue has not declined appreciably from its historic average, so it initially came as a surprise to many in the community that dissolution would be the chosen path. While some could read the Dandelion story as spin - or putting a brave face on an otherwise disappointing development - the majority of the conversation participants felt the Dandelion Strategy was both logical and strategic.

## The Acquisition Option

Acquisition was an option explored for many months with a national organization which ultimately became one of the final legacy partners - United for Literacy (formerly Frontier College). This path made considerable sense 'on paper' as it would have paired a mature organization with a national focus and reputation, but which focuses on youth and adults only, with Calgary Reads, which focuses on the early years. It would be a logical form of 'vertical integration', focusing on literacy throughout the entire life cycle. In other words, a classic 'bees and trees' strategy.

However, both organizations eventually agreed that this was ultimately not the most optimal pathway. Their operating cultures, methodologies, and programmatic structures were deemed to be sufficiently different that the demands and pains of a merger would have imposed too much strain, such that the cost and challenges would likely outweigh the opportunity.

This would also have been perceived by the public as more of an 'acquisition' than a 'merger'. From a legal standpoint, a merger is when one entity winds up its affairs and transfers its assets to another.<sup>66</sup> However, as outlined in a previous Institute for Community Prosperity publication, *Merging for Good: A Case-Based Framework for Nonprofit Amalgamation*, a merger in the public imagination, and based on many more examples from the private sector, is not actually an absorption of one organization by another, but rather is almost always the creation of a *brand new* entity (if not legally, then at minimum from a name and branding perspective, as with Boys and Girls Clubs and Aspen Family Services merging to create a brand new entity - Trellis).

Significantly, there was no pressure from funders for Calgary Reads to merge or amalgamate, though there was support for choosing to at least explore these options. This is an ideal place for an organization and funders to be in,<sup>67</sup> with funders responsive and willing to support exploration into mergers, amalgamations, or even closures, yet not penalizing the organization if things fall through.

## The Public Library Option

Almost all of the interviewees asked about what role – if any – the Calgary Public Library was playing in the Dandelion Strategy. The Calgary Public Library (the Library), 111 years young, is one of the world's largest and most sophisticated municipal public library systems. It reaches over 750,000 members with 20,000 visitors a day, including more than 150,000 cardholders under the age of 18. Operating across 21 locations, it provides over 12,000 square feet of space for children to read, learn and explore at its new Central Library location alone, and provides a wide range of programs and services focused on early literacy and the joy of reading.<sup>68</sup>

While Calgary Reads and the Library do have a history of working together, the Library did not end up becoming a partner in the Dandelion Strategy. Ultimately, Calgary Reads was able to engage with new partners less well-established in the early literacy space. A hand-off to the Library could definitely help with 'scaling out', but it would do little to help 'scale up', as there is already a strong public expectation that the Library prioritize early literacy. In effect, it would not be adding a new voice to the systems-change imperative.

There are also broader questions that come up elsewhere in this case study about large organizations' cultures and capacities - school boards, universities, governments, hospitals, and so on - to interact and work with grassroots groups. For a public library system as large and sophisticated as Calgary's this will similarly be a challenge, but as an entity that is able to scale innovation, and to the extent it is able to create space for grassroots partnerships, it also represents an exciting opportunity.

Moving forward, it will be important in the Literacy Lab phase to include the Public Library, given the range of interests, programs and potential for contributing to scaled early childhood literacy approaches. The Library remains eager to partner with organizations to increase their community presence and the reach of early literacy work.



# Scaling Impact: The Rationale for Dandelion

“Everything needs to get bigger and better than ever before because the problem, sadly, has just gotten worse with more learning loss and more children not having the books they need to have in their own home,”

Stacey Pinney, Founder and CEO, Calgary Reads

After the acquisition option was thoroughly explored, some other form of creative destruction - of release leading to renewal - was deemed necessary by Calgary Reads' leadership (both by the board and by the CEO). The lack of early literacy in our society appears to be getting worse, not better, and a radical scaling of impact is required. But there were clear limitations to achieving broad impact within the existing single-organization container, and franchising or social enterprise options seemed either prohibitively expensive or daunting. The imperative to not just scale 'out' but scale 'up' in order to achieve impact across a greater swath of the community, and to lay the groundwork for greater systems change (including potential policy change), inevitably means extending out to other organizations. Henceforward, the Dandelion Strategy took shape.

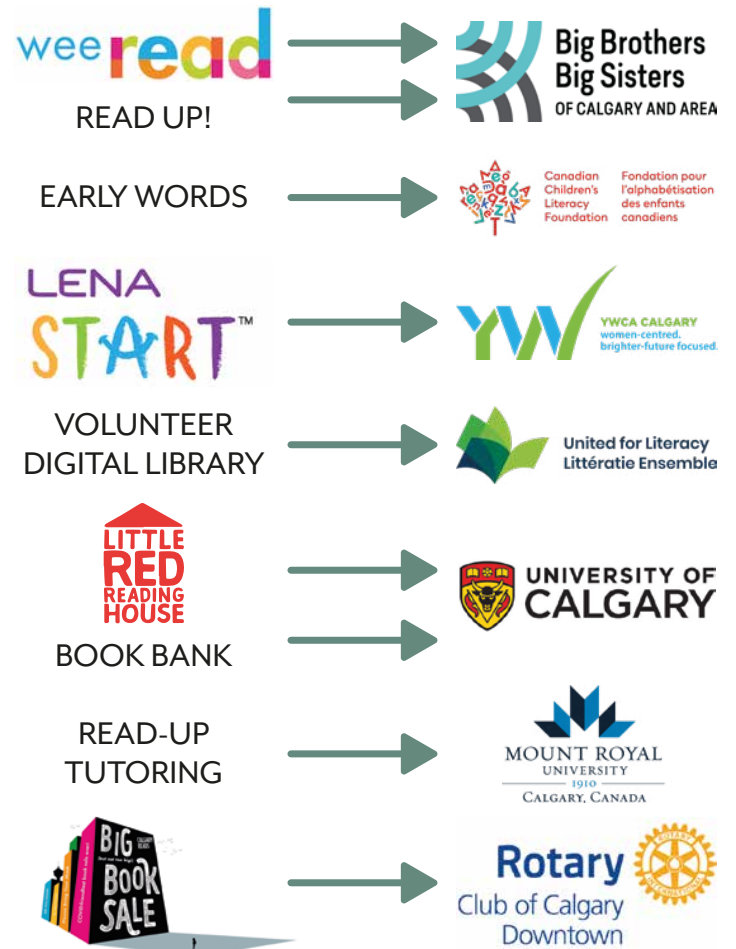
## The Dispersal

The Dandelion Strategy involves the selection of a small number of organizations that Calgary Reads deemed to be both strong and capable, and with the reach and resources that could have the potential to scale their array of programs (helping a greater number of children), while maintaining fidelity to the programs' intent and pedagogy. A larger set of organizations were consulted as potential partners prior to the final seven taking shape. The Seed Partners include two national organizations, two local community groups, a service club with internationally recognized brands, and two local universities. These organizations are listed in the following diagram, indicating which Calgary Reads program they are assuming responsibility for adopting and adapting. A more detailed description of each organization and their role in the 'hand-off' is described in the next section.

In addition to the official Seed Partners, it may be helpful to consider Vibrant Communities Calgary as an 'unofficial' partner, as they have taken up the less tangible, less obviously programmatic, challenge of raising public awareness of the cost of early illiteracy through the launch of the new *Left Unread* campaign.

Calgary Reads' emphasis on high quality brand, graphic design, and clever allegorical communications has been applied to the Dandelion Strategy as well as the *Left Unread* campaign. From a dynamic website, media release, "seed release party" and numerous speaking and podcast engagements for CEO Stacey Pinney, the Strategy has continued this tradition of colourful, engaging communications, effervescent with positive messaging. At the release party, each of the legacy partners was given a 'bundle' containing artworks and books, including the social innovation classic authored by Frances Westley, Brenda Zimmerman and Michael Quinn Patton, *Getting to Maybe: How the World is Changed* (2007). But beneath this layer of exuberance is a real strategy, reliant on a group of legacy partners.

Figure 2: The program dispersal from Calgary Reads to the Seed Partners





# The Seed Partners

**“To be a flower is a profound responsibility.”** Emily Dickinson, Bloom (1866)

According to Canadian tax law, when a registered charity dissolves, any remaining assets (whether financial or non, tangible or intangible) must be disbursed to one or more other ‘qualified donees’, typically other registered charities. In this case, all seven Seed Partners, or as the CRA might refer to them - asset receptors - are registered charities. The following organizations have assumed the responsibility of adopting and adapting Calgary Reads’ suite of programs and assets:

## Big Sisters Big Brothers of Calgary and Area

Big Sisters Big Brothers (BSBB) are experts at creating one-to-one mentoring relationships for children and youth in Calgary. BSBB has taken on the delivery of legacy programs **we read** and **Read Up!** Among other early milestones, BSBB launched a new website - [weeread.ca](http://weeread.ca) - and have begun to integrate early literacy as a core strategic priority.

**“We know that literacy is an important protective factor for children and we have seen evidence of this time and time again within the mentoring relationships we support at Big Brothers Big Sisters. We look forward to expanding that focus very intentionally and we see so many opportunities ahead,”**<sup>69</sup>

Ken Lima-Coelho, President & CEO, Big Brothers Big Sisters of Calgary and Area.

## Canadian Children’s Literacy Foundation

The Canadian Children’s Literacy Foundation (CCLF) has a vision to build a brighter, more literate future for all children in Canada. This Toronto-based national organization promotes and develops literacy initiatives, champions literacy partners across Canada, and empowers people to build literacy skills in their homes and communities. They are adapting and integrating **Early Words** into their national programming.

**“We’re grateful to Calgary Reads for the tremendous progress they’ve achieved over the past 22 years. Their Read with Me initiative lays the foundation for a healthcare-based approach to children’s literacy in Canada. We’re proud to be carrying on its legacy through our Early Words program as we work with clinics in Calgary and throughout Canada,”**

Ariel Siller, CEO, Canadian Children’s Literacy Foundation.

## YW Calgary

YW Calgary, formerly YMCA, offers a continuum of preventative and restorative services to support women, their families and their community toward a place of wellness. YW Calgary is integrating **LENA Start** into their programming as part of a broader digital transformation strategy. Since the transfer, there has been significant interest from partners in the LENA program, and though YW Calgary is currently the only Canadian location running LENA, there is significant interest from other YWCA’s across the country.

**“YW Calgary is excited to nurture our ‘Dandelion seed’ from Calgary Reads by further embedding LENA Start in our programs and digital technology strategy. We know LENA offers a unique evidence-based process that fosters and expands strong and healthy futures for children and their families,”**

Sue Tomney, CEO, YW Calgary.

## United for Literacy

United for Literacy (formerly known as Frontier College) is a national charitable literacy organization that shares Calgary Reads’ core belief that literacy is a human right. United for Literacy, which to date has primarily served adults, youth and older children in building literacy skills, is committed to expanding its ambit into early literacy, and to finding and using innovative ways to reach people facing barriers to education, including in rural and remote communities. United for Literacy is stewarding Calgary Reads’ volunteer training resources, including the **Literacy-in-a-Box**, **Parent Café**, and other resources, ensuring that children from coast to coast to coast continue to benefit from the material. United for Literacy had not previously had a presence in Calgary.

**“We are very much looking forward to extending the life of the amazing resources Calgary Reads has created so we can further support community literacy volunteers—and our work with children, youth and adults across the country with some of the very best training materials,”**

Richard Harvey, Regional Director West & Prairies, United for Literacy.



## Owerko Centre (University of Calgary & Alberta Children's Hospital Foundation)

The Owerko Centre for Neurodevelopment and Child Mental Health, a partnership between the University of Calgary and the Alberta Children's Hospital Foundation, aims to "optimize brain and mental health for children and families through research, education, and community engagement."<sup>70</sup> Founded in 2015, the Owerko Centre brings nearly 50 researchers together in a hub model from a broad range of disciplines (including Social Work, Education, Nursing, and various medical science fields focused on neurodevelopment and/or child mental health). Calgary Reads transferred ownership and management of the following initiatives: The **Little Red Reading House** in Inglewood, The **Little Red RV**, **Book Bank**, and **Reading Place Affiliates** (located throughout the city at Big Brothers Big Sisters, carya, Children's Cottage, CUPS, Discovery House, Families Matter, miskannawah, Women's Centre of Calgary, Youth Centres Calgary (YCC), YW Calgary. Owerko subsequently also developed the Little Red Reading Nook in their Child Development Centre at the Alberta Children's Hospital Research Institute. The vision for the Little Red Reading House is as an evidence-to-practice early learning research hub, as well as a meeting/gathering space.

"We are delighted to discuss how the Owerko Centre and UCalgary can build on and collaborate with the extensive community network established by Calgary Reads to create community-engaged and community-embedded research about the critical importance of early literacy,"

Dr. Susan Graham, Director, Owerko Centre at the Alberta Children's Hospital Research Institute.

## Mount Royal University (MRU)

Mount Royal University and Calgary Reads have collaborated in a variety of ways for several years. For example, they have co-delivered one-on-one tutoring experiences between Bachelor of Education students and young readers, and Calgary Reads engaged MRU Interior Design students to design cozy nooks in the Little Red Reading House. MRU's Department of Education adapted the **Read Up Tutoring** program into **MRU Reads**, a tutoring framework designed for MRU Education teacher candidates, rooted in the neuroscientific evidence-based benefits of reading, to help them teach foundational literacy skills to elementary students. The online tutoring website [mrureads.ca](http://mrureads.ca) was launched in late summer, 2023.

"Mount Royal University B.Ed. students have learned so much about how children learn to read from the experience of tutoring children. We are excited to carry on the proud tutoring tradition initiated by Calgary Reads to support the children of Calgary and the next generation of teachers,"

Jodi Nickel, Professor, Department of Education, Mount Royal University.

## The Rotary Club

The Rotary Club of Calgary, colloquially known as the Downtown chapter (one of seven Rotary Clubs in Calgary) has an explicit focus on promoting childhood literacy. Rotary is a well-known international service club of "business, professional and community leaders who come together through commitment and fellowship to create opportunities and a better future for generations who follow."<sup>71</sup> A long-time supporter of Calgary Reads, the Rotary Club of Calgary assumed the ownership and stewardship of the most critical fundraising asset, the **Big Book Sale**. In their first annual book sale since the hand-off (spring of 2023), they raised \$500,000, which is not just a record amount, but also likely a record for a single Rotary fundraising event of any kind in the city. A fifth of the proceeds - \$100,000 - supported the Book Bank, now located at the Owerko Centre at University of Calgary, with the remainder - \$400,000 - being split between the Seed Partners, Left Unread and a few small grants to other childhood literacy related initiatives. The level of involvement of Seed Partners in volunteering for the book sale varied significantly.<sup>72</sup> Rotarians interviewed noted how significant the Book Sale was in energizing their membership and influencing how they intend to manage other events and investments of members' time and talent.

"We are thrilled to be working with Calgary Reads to examine how we can participate in sustaining the Big Book Sale ... this amazing event that brings Calgarians together in support of early childhood literacy."

Manon Mitchell, President, Rotary Club of Calgary, Downtown



## Ensuring Long-term Impact

To help ensure that the legacy projects - the “dandelion seeds” - are being nurtured to grow and thrive over time, Calgary Reads undertook the following transition stewardship initiatives:

1. Transitioning outgoing CEO Steacy Pinney’s role to become a part-time Changemaker in Residence at Mount Royal University (described in more detail in the next section).
2. Transitioning all staff, and a number of volunteers and board members to seed partner organizations in new or continuing roles. As noted by Pinney and others, their passion for the cause has meant that upholding the mission is still a part of their work and still a part of their lives.<sup>73</sup>
3. Undertaking this case study, which surfaces early learnings, cautions and suggestions to ensure optimal success.
4. Commissioning a public policy-focused primer on the state of literacy in Alberta, conducted by the Canada West Foundation (referenced elsewhere in this report).
5. Partnering with Vibrant Communities Calgary to produce the 3-6-9 Series, which delves into topics around the value of literacy and learning in the early years, ultimately feeding knowledge about how the community can better help children in poverty overcome barriers at the critical ages of three, six, and nine.
6. Supporting the development of the Left Unread campaign, a grassroots movement focused on challenging the larger systems creating gaps in literacy.
7. Transferring annual Big Book Sale proceeds, which are now managed by the Rotary Club, to support the seed partner legacy initiatives.
8. Engaging the Trico Changemakers Studio to conduct a year-long workshop series to build relationships and a sense of shared purpose and momentum among the Seed Partners.
9. Conducting a year-long developmental evaluation process, informed in part by this case study; and
10. Planting the seeds for a Studio-convened Literacy Lab, described in the next section, to be launched in 2024, with the support of an anonymous donor working through the Calgary Foundation.

## Connecting Insights to Social Innovation

Many of the strategies listed in the previous section are aimed at linking new efforts to engage in deeper learning, and ultimately help effect systems-wide change. Three such efforts are described in more detail here:

### Changemaker in Residence

Pinney herself was provided a new 2-year role as a Changemaker in Residence at Mount Royal University, funded by an anonymous donor brokered through The Calgary Foundation. A joint appointment between the Department of Education, Trico Changemakers Studio, and the Institute for Community Prosperity, the purpose of the Changemaker in Residence role is to contribute both to MRU’s learning ecosystem and to the broader community through knowledge sharing, mentorship, faculty collaboration and campus community engagement. This role entails the following components:

- On-site part-time presence at the Trico Changemakers Studio, a community co-working and social co-laboratory space, during the academic year, through 2025.
- Knowledge Sharing with students through mentorship and guest lectures, with faculty working on early childhood literacy, and with the broader community through workshops, “lunch and learns”, participating in speaking events, and other means of in-person and online engagement.
- Working with faculty and administrators on campus to mobilize effort toward making MRU an early literacy centre of excellence.<sup>74</sup>
- Engaging the legacy “dandelion seed” partners on a regular basis, including through a year-long series of workshops, described in more detail following.
- Supporting the development of a Literacy Lab.

### Seed Partner Workshops

A series of one-day workshops were convened by the Trico Changemakers Studio with Seed Partners, also involving Pinney in her new Changemaker-in-Residence role. These were held in October, 2022; January, 2023; April, 2023; June, 2023; and September, 2023. Through this process, the Seed Partners collectively framed the ultimate opportunity of the Dandelion seed dispersal as follows:

***How might we nurture a rich literacy ecosystem that ensures all children have access to fun, safe, and inspiring opportunities to discover and embrace the joy of reading?***



Partners agreed that long-term success will hinge on more meaningful collaboration (in particular with schools); open, honest, and continuous sharing between partners; aligning on advocacy, policy-change, and movement-building; incorporating lived experience (of parents, children, teachers, and caregivers); enhanced public awareness of early childhood literacy; and encouraging uptake among school boards and professional teachers and caregivers.

Partners also cautioned that such factors as silos/stovepipes, reactionary approaches, discord about how literacy is acquired (competing teaching theories and learning methods), making the legacy transfer a peripheral ('side of the desk') concern, and general apathy in the community toward early literacy could all kill momentum and undermine long-term success.

The Partners also engaged in a couple of forms of systems mapping:

1. An actor map identifying and understanding linkages between organizations with a stake in early childhood literacy. This includes education and research organizations (school boards, universities, institutes), nonprofit service providers (whether exclusively focused on literacy, or social/community organizations that run literacy programs), funders (government, private sector, and philanthropic), advocacy organizations (whether directly connected to literacy, or other potential advocates with existing influence), and health organizations (public clinics).
2. An adaptive cycle, mapping the journey from Calgary Reads to the fully-fledged dandelion dispersal. Seed Partners used a version of the adaptive cycle to map specific milestones and events in the Dandelion journey along this looping timeline. An abstracted depiction of this map is included below:<sup>75</sup>

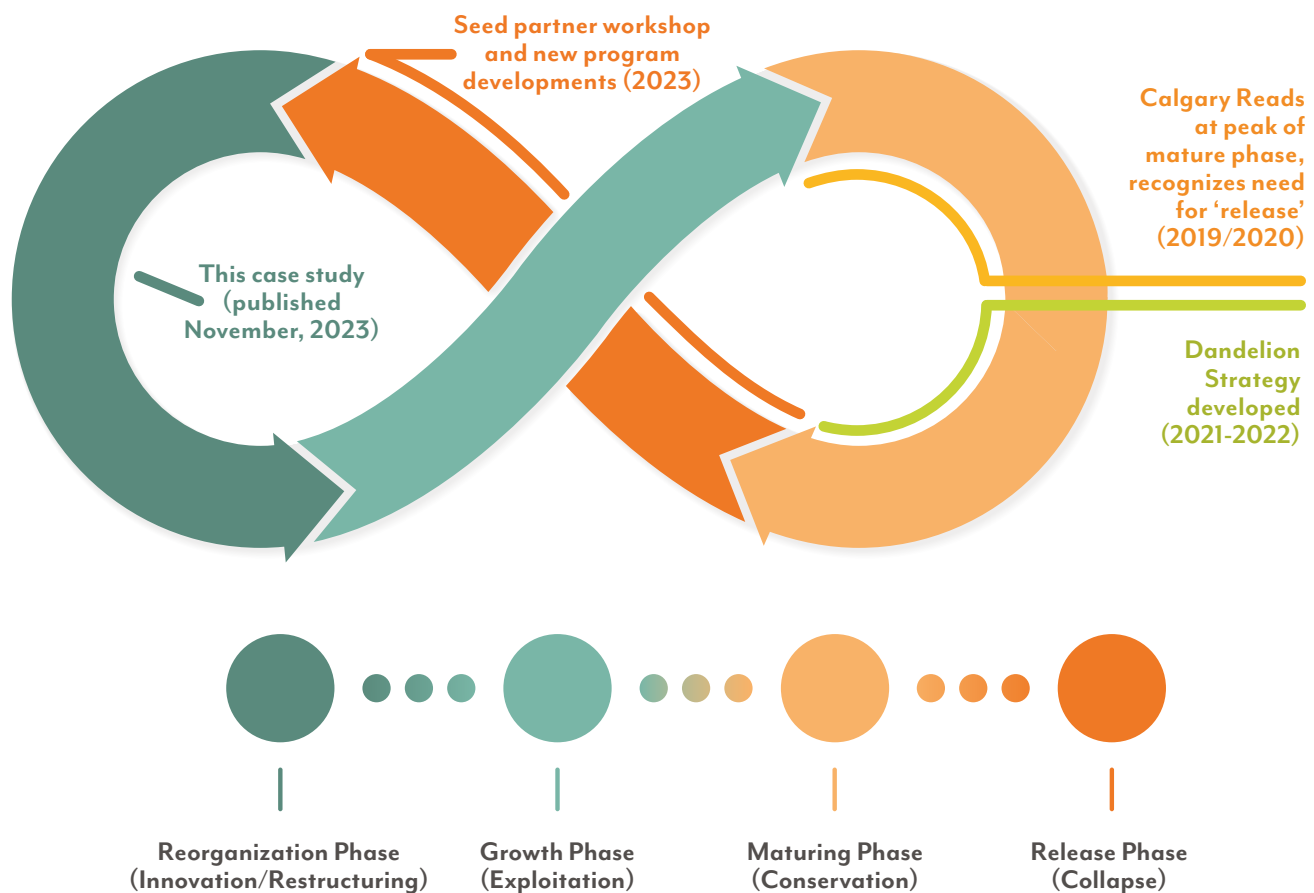


Figure 3: The Dandelion Adaptive Cycle Journey

The Seed Partners also made a series of commitments beyond the life of the workshops (i.e. into 2024 and beyond), and even well beyond the scope of the Calgary Reads legacy projects:

- Bring program insights from non-university partners into the university education class settings, so teachers-in-training have access to these insights.
- Bring funders together to understand and advance early childhood learning.
- Form a strategy to collectively advocate for policies that advance early childhood literacy, both with government and school boards.
- Expand the public awareness and on-site learning components of the annual Book Sale.
- Connect university students to tutoring opportunities at (Rotary-supported) Youth Centres throughout Calgary.
- Initiate a shared evaluation and impact measurement strategy.
- Commit to personally reading more books, and sharing insights from these books with other partners (via the Changemakers Book Club<sup>76</sup> or some other means).
- Academics at the table will collate and share research insights.
- Continue to meet. Go for coffee. Continue and deepen the relationship-building begun through the workshops.
- Advance the Left Unread campaign, in the workplace, through social media, with neighbours, and beyond.

There was also strong consensus that the five workshops, while essential to progress, are not enough. There is a need to continue meeting - the Dandelion Strategy, Partners all agree, takes time but cannot be forced.

The insights formed in the Seed Partner workshops could potentially inform the Literacy Lab to follow.

## Literacy Lab

The Literacy Lab, beginning in 2024, will be a social lab convened around the topic of strengthening early childhood literacy in Alberta. As of early fall, 2023, the specific lab parameters and structure are in development, and the participants have not yet been fully identified or approached.

Social labs, also called change labs or innovation labs, are based on the premise that since we have scientific and technical laboratories for solving our most difficult scientific and technical challenges, why should we not develop social laboratories for solving our most challenging social problems? Labs are premised on “getting the system in the room”, including key government, nonprofit and other partners, as well as those with lived experience of the issue. A later section of this report explores social labs in more detail, and some of the context-setting and success-maximizing parameters necessary for the Literacy Lab to optimize the potential for long-term social impact.



# Insights

The following themes, patterns, and learnings emerged from the two sets of conversations with key protagonists and observers in the Dandelion dispersal story, as well as from attending the last two Seed Partner workshops. Where significant, any insights which shifted between the 2022 and 2023 conversations informing this report have been noted as early insights and predictions or post-dispersal reflections.

But first, to provide additional context, following is a quick look at what can be gleaned from the literature and data:

The challenging nature of working in the nonprofit sector is well documented.<sup>77</sup> The experience of nonprofit organizations in Alberta, for example, is captured in the 2022 CCVO report *Alberta's Nonprofit Sector: Too Essential To Fail*. Nonprofits are asked to “meet increasing demand for services from the community with fewer resources.”<sup>78</sup> Subsequent reports and studies have emphasized the sector’s overall precarity, both financial (amid declining government and philanthropic revenues), and human (amid declining volunteer rates and precarious employment that puts the sector at an extreme disadvantage for attracting and retaining top-quality talent).<sup>79</sup>

There is a large body of literature on the challenges of nonprofit growth.<sup>80</sup> However, there is very little writing on nonprofit dissolution or termination. In fact, one older study on the termination of a US-based child-serving nonprofit, out of necessity drew instead from “the literatures of public administration (public agency termination), organization theory (life cycles of organizations), and business administration (firm failure).”<sup>81</sup> Few conversation participants could recall examples similar or comparable to the Calgary Reads Dandelion Strategy. One noted The Sprout Fund’s sunset strategy,<sup>82</sup> while another was reminded of Civic Action in Toronto, an organization that would specifically incubate initiatives and then embed them elsewhere. Occasionally, philanthropic foundations wind down and strategically disburse their assets to have an accelerated legacy impact, the Ivey Foundation being a recent example of note.

A systematic review of what makes nonprofits thrive or fail noted that the realm of nonprofit dissolution research is small and that existing knowledge is fragmented.<sup>83</sup> One still oft-cited study from nearly 30 years ago looked at nonprofit mortality through the 1980s and concluded, not surprisingly, that “overall, nonprofits that ceased to operate were younger and smaller, used fewer strategies to attract funders, and had less diversified income streams than survivors.”<sup>84</sup> What little contemporary research exists on the topic is often framed in terms of decline<sup>85</sup>; i.e. with the (not unreasonable) *a priori* assumption that nonprofits looking at dissolution must inevitably be in a state of decline. This is of limited value in relation to this case study, as Calgary Reads decided to close shop not in a period of decline, but instead at the pinnacle of its success.

There is considerably more research on the topic of scaling for social innovation. As one frequently referenced Canadian study notes, “scaling social innovations to effect larger-scale change involves a more complex and diverse process than simply ‘diffusing’ or spreading a product.”<sup>86</sup> It goes on to distinguish between three types of scaling; “scaling up”, which implies changes to policy and/or institutions so that the “rules of the game” are altered; “scaling deep”, which relates to the changing of people’s hearts and minds, their values and cultural practices, etc.; and “scaling out”, which is dissemination or replication, typically through either franchising or partnering, or through transferring programmatic assets to other organizations.<sup>87</sup> Viewed in this light, the Dandelion Strategy is mainly a *scaling out* approach. However, all three types of scaling are relevant, and often required, to effect systems change. Mark Cabaj, an Alberta-based thought leader on community development, social innovation, and collective impact,<sup>88</sup> adds two other forms of scaling for impact; “scaling scree”, which involves creating adapted or complementary innovations that seek to address the same challenge as the original innovation; and “scaling infrastructure”, which involves “creating the financial, technical [and] network supports required to support conditions for scaling.”<sup>89</sup> Aspects of *scaling scree* and *scaling infrastructure* would also apply to the Dandelion Strategy.

Data-wise, it is easier to document the dissolution of *registered charities* than the more general category of nonprofits. The majority of nonprofits are registered provincially, and - unless they are also charities - can exit the scene without dispersing their assets to one or more qualified donees. Of the 23,682 charities “voluntarily revoked” in modern Canadian charitable history (i.e. over the past half century), 10.5% of these (or 2,518 organizations) have been dissolved either in 2021 (873), 2022 (752), or in the first 10 and a half months of 2023 (893).<sup>90</sup> While this might seem like an alarmingly high proportion, and it is most certainly an accelerated pace of dissolution, it is good to keep in mind that over 4,452 new charities were registered over the same period. A relatively small number of literacy-focused charities - 59 in total nationally - have voluntarily dissolved over the past few decades, though this includes 7 just in the past year, as well as Calgary-based Literacy Alberta Society (dissolved in 2017) and the Alberta Literacy Foundation (dissolved in 2007). What this data does not reveal, however, are the reasons for dissolution.<sup>91</sup>



# Dandelions Thrive in the Grass: Grassroots Change is Essential to Social Innovation

“The really helpful things will not be done from the centre; they cannot be done by big organizations; but they can be done by the people themselves.”<sup>92</sup>

E.F. Schumacher, *Small is Beautiful*

One of the ironies about social innovation is that those that can afford to talk about it most - governments, universities, foundations - are not typically where new ideas and innovation emerge. More frequently, social innovation emerges from the grassroots. From either visionary, tenacious changemakers, or much more frequently *groups* of people organizing around and/or prototyping a new approach. Calgary Reads began as one such grassroots initiative.

However, a perennial ‘systems challenge’ across civil society is transferring grassroots innovation into scaled community-wide or society-wide change. Far too many social innovations pop into existence from social entrepreneurs, but then due to a complex array of structural, cultural and legal challenges, disappear just as quickly or otherwise struggle with scaling impact. Megan Davidson, a recent Catamount Fellow with the Institute for Community Prosperity, identified a range of gaps that prevent grassroots innovation from scaling: Very short-term, inconsistent, and strings-attached funding, especially compared with venture capital in commercial innovation; a perceived lack of legitimacy as compared to more established groups; unconventional governance structures; blind spots (to research, ‘competition’, potential allies, or other contextual features); and a lack of power among the groups served by the intervention or innovation.<sup>93</sup> Indeed, it is hard to imagine a more politically powerless group than pre-school-aged children who lack access to reading and literacy development.

As one commentator asks, noting the worldwide challenge of scaling local innovations, “if the method or approach of a social innovator shows promise, how can it be scaled up without succumbing to the logic, and reproducing the blind spots, of the government or private sector? ... [I]s it better that these innovations remain local and small scale?”<sup>94</sup> Highlighting a case study from Aarhus, Denmark, the difference in success of scaling local innovations appears to be where the “protagonists of these stories are at home in the intelligence-sharing ‘bazaar’ that serves as a counterpoint to the intelligence-conserving ‘cathedral’.”<sup>95</sup> This is good news for the Dandelion process, where openness is the operating norm, as opposed to the conservation (i.e. hoarding) of Calgary Reads’ accumulated knowledge and wisdom. Even Silicon Valley understands that open access produces innovation; Witness the incredible success of the (originally not for profit) OpenAI in producing generative artificial intelligence (and the seeds of artificial general intelligence) years or decades before most predicted.

But even if Silicon Valley may have cracked the code to crowdsourcing grassroots innovation, it remains a challenge for most larger and/or well established nonprofit organizations. So it is reasonable to wonder whether the ‘trees’ are inevitably too old, larger or rigid to respond to the ‘bees’. Consider this batch of legacy partners: United for Literacy was founded as Frontier College not last century, but the century prior, in 1899. The YWCA (now rebranded as YW) is even older, founded in 1855. Rotary and Big Brothers (merging in Calgary many decades later with Big Sisters) were both founded around the turn of the last century. Rotary struggles with declining membership in most western nations amid caricatures like those of Guardian writer Paul Mason, who lumped Rotarians in with “a galaxy of pub bores” and “golf-club sexists” in critiquing the Tory-led Brexit movement.<sup>96</sup> The University of Calgary is a lot younger, but huge - sitting among Canada’s largest U15 (research-intensive, doctoral-granting) institutions. Mount Royal, which may seem small by comparison, is the largest undergraduate-only university in Canada, also founded more than a century ago. Moreover, universities struggle innately with social innovation for many well-documented reasons, both ancient and contemporary.<sup>97</sup> Even the Canadian Literacy Foundation, founded just over 5 years ago, is far from grassroots, co-founded by a book retail magnate and the chair of Canada’s national pension fund.<sup>98</sup>

None of this appears on the surface to be fertile ground - agile asset receptors - for Calgary Reads’ plucky programmatic innovations to flourish in resurrected form. But a closer look reveals some interesting features, that hold promise as receptor cultures:

- YW models YWCAs’ perennial ability to reinvent and reinvigour themselves, likely because the Y has always had a (partial) social enterprise orientation, but also in Calgary it has benefitted from extraordinary grounded leadership over the past decade.
- Big Sisters and Big Brothers, also led by a visionary CEO with a reputation for community collaboration, is itself the product of a previous innovation - a rare (at the time) nonprofit merger.
- Rotary is filled with city builders and civic boosters who are highly networked, entirely volunteer, and know how to fundraise and manage money. They proved this handily in raising \$500,000 in their first Book Sale. And when Rotary embraces a cause, they embrace it enthusiastically.





- United for Literacy, having just gone through a bold name change of a 120+ year-old brand, made some of the first commitments of any national nonprofit organization toward Reconciliation, including adopting the UN Declaration on the Rights of Indigenous Peoples.
- University of Calgary is represented in this partnership by Owerko, an institute with some latitude to innovate outside the conventional strictures of academia.
- Mount Royal University, an Ashoka-accredited Changemaker Campus, incentivizes and encourages community engagement and social innovation. The Education Department has partnered for many years with Calgary Reads.
- The Canadian Children's Literacy Foundation is new, eager, and well-positioned to absorb and nationally scale early literacy programming.

## Deciding to Go to Seed: Insights in Choosing the Dandelion Strategy

**“Perhaps the various burnings of the Alexandria Library were necessary, like those Australian Forest Fires without which the new seeds cannot burst their shells and make a young, healthy forest.”**

William Golding (A moving target)

**“We hope [the Dandelion Strategy] opens doors to looking at what is wrong with the system.”**

Stacy Pinney

To paraphrase the poet Robert Frost, Calgary Reads has chosen the road less travelled. With almost no previous analogues to draw upon, the Dandelion Strategy was a unique solution to address “succession, sustainability and scale.”<sup>99</sup> Rather than transition to a new CEO who would lead the team in facing the same (if not greater) hurdles, circumscribed by very real limitations to scale activities and impact, Calgary Reads decided to take a chance in spreading knowledge, commitment and accountability to other organizations. This sent a clear message that the broader community, the education sector, and governments need to take responsibility for something as important to our society as early childhood literacy.<sup>100</sup>

Calgary Reads was able to build and maintain its programs largely because of a dedicated and visionary founder and leader who could rally others behind the vision, tap into her vast community networks, and contribute to the organization far above what a person with the same vision, skills, and assets would be compensated for in a comparable public or private sector role. From her time as founder, then Board Chair and eventually Executive Director, Pinney was a champion who often reached out to her personal contacts to support the cause. This is an all-too-common story in the nonprofit sector, but as one conversation participant noted, “you have a passionate leader who reaches out to make something happen, but should this issue be dependent on one person’s network?” Additionally, as Pinney has herself acknowledged, her ability to do the work relies a lot on privilege; the ability to do the job with low compensation, to reach out to her network to fundraise, and even to have the choice to step away from a paid job.<sup>101</sup> It is bold for individuals and an organization to recognize this pattern - of carrying society’s values on the backs of few - and publicly declare ‘we won’t continue this way of doing things’.

While Calgary Reads was not experiencing significant financial struggles, which is one of the worst times to consider a merger or amalgamation, part of its ability to continue on was a result of fundraising through Pinney’s networks and her ability to take on the role without job benefits or high compensation. Calgary Reads had long been thinking about succession planning and it became increasingly clear that finding a successor would be difficult. The pool of potential leaders would have been limited to those who also bring networks of high net worth individuals and/or an ability to accept the role at lower compensation (because they have other sources of financial support). It might otherwise be a disservice to the person asked to step into the role, potentially setting them up for failure.





## The Challenge of Nonprofit Succession

Leaders in the charitable sector are in a highly unenviable position compared to their counterparts in the for-profit sector, or even in the public sector, with respect to compensation or capacity to plan and execute successful succession planning.

To begin with, there is a structural talent and leadership deficit in the sector.<sup>102</sup> The structure of nonprofit organizations does little to incentivize talented individuals choosing to pursue a path of nonprofit leadership; Nonprofit leaders have limited actual freedom to make changes and try out creative solutions due to funding restrictions or board-imposed restrictions, and earn less than their counterparts in the private or public sectors; So much so that a for-profit CEO could just donate the same amount of money they would have earned to the cause rather than actually work in the sector.<sup>103</sup> It is also not unusual for nonprofits to rely on one or a few undercompensated people who carry far more of the workload than they should need to. A widely-shared perception in the community is that professional nonprofits are run by volunteers or by staff who in effect waive the equivalent market-based compensation because they are in a community-oriented vocation. While this expectation is perverse in its implications, it is nonetheless widely shared.

Many in the sector also shy away from or simply neglect to address questions around succession planning. Leaders feel they cannot step away because they wholeheartedly support the cause, or because the work never seems to be finished. Organisations have difficulty making time for succession planning. It typically tends to be deferred until it cannot be avoided (or is simply too late). There is also a strong tendency among many nonprofits to promote from within and reward long-service, but typically there is no time to actually prepare and groom staff into leadership positions. And, like any workplace, there is often fear of what further changes a new leader might bring.

Some conversation participants worried that there would be a perception in the community that Calgary Reads' dissolution reflected failure by their leadership, board, staff, and/or volunteers - these fears were largely alleviated by the time participants were asked for post-dissolution reflections. Some also questioned how Calgary Reads could permit itself to end up in this position; Relying so heavily on one person that they are now better off shuttering rather than take steps to fill the gap left by the leader's departure. On the other hand, if advocating for change within the container of a small-to-mid sized non-profit organization has not moved the needle on systems level change, it is rational to try an entirely new strategy.

Many recognized the challenges Calgary Reads experienced in trying to grow their impact, though some wondered why it had been difficult to fundraise around a topic involving kids, which hints at some of the underlying assumptions about the issue of literacy and funding in general. Causes about kids tend normally to "tug at the heartstrings", so people should want to support kids' reading,<sup>104</sup> but donor motivations are far more complicated, and philanthropy is a shifting landscape. Literacy organizations also have to confront our society's belief that reading is taken care of and is the parent's or teacher's responsibility.<sup>105</sup> Appreciating that reading actually is a community responsibility, and that it is the community that stands to benefit (with, as we have seen, compelling return on investment) is an uphill climb.

# Aloft and Away: Insights as One Story Closes and Others Begin

“The second step of transition comes after letting go: the neutral zone. People go through an in-between time when the old is gone but the new isn’t fully operational. It is when the critical psychological realignments and repatterning take place. It is the very core of the transition process. This is the time between the old reality and sense of identity and the new one. People are creating new processes and learning what their new roles will be. They are in flux and may feel confusion and distress. The neutral zone is the seedbed for new beginnings.”<sup>106</sup>

William Bridges, *Managing Transitions*

As Calgary Reads approached the day it would scatter its seeds, one would expect the participants to see their joy and hopes for the future overtaken with a sense of uncertainty and loss. However, conversation participants were largely optimistic. Stakeholders in many ways expected to be surprised yet again by Calgary Reads after years of birthing inventive new initiatives, so the news of the Dandelion Strategy, a little known and seldom tried option for a nonprofit to dissolve and spread, follows this trend. There were still questions, details to finalize, and some worries, but overall there was a sense of trust and comfort - participants believed in the story even if they did not have all the details of the narrative. As one participant noted, they had confidence that each of the programs would be in good hands, but had more uncertainty about the broader gamble that people would *come together* to collectively build on the strong voice Calgary Reads had established in advocating for children’s literacy. One participant emphasized the need for a multi-nodal, decentralized network going forward, rather than relying on one Calgary Reads legacy node to bring groups together (and by inference gate-keep or control how the Seed Partners interact).

Some noted that a fine balance will have to be struck between fidelity to the original program design and delivery, and adapting to new homes, cultures, data, and shifting conditions. An inflexible devotion to maintaining every aspect of each program is likely to yield fewer positive outcomes than a sensitive context-informed adaptation. On the other hand, adapting to the point that the program becomes fully unrecognizable may also yield diminishing returns. Other polarities that were mentioned include the tension between being universal (fully public) vs. strategic (focusing on literacy-barriered population segments), and whether some of the programs aim to integrate more with the public school system, or whether they exist in all respects external and unconnected to the school system. One year into the dissolution process, many of these elements are still being refined and worked out.

Stakeholders noted Calgary Reads’ efforts, and uphill challenge, in trying to find ways to effect broader systems change and hoped that the Seed Partners would remain strong advocates for systems change even without Calgary Reads to provide guidance. The organization and its leaders are perceived to have focused on the greater good - the state of early literacy in Calgary - and served as an example of “how we should be collaborating together - focusing on the end user and not the legacy of the organization.” One person noted that it was counterintuitive, but winding down had ironically drawn tremendous attention to Calgary Reads’ work, which then fostered new connections and partnerships that might not have occurred if they had continued on their prior path. Invoking the Adaptive Cycle again, this ‘release phase’ has unleashed new possibilities for innovation and collaboration which would have been unlikely if Calgary Reads had instead extended its own growth and maturity phase.

Some concerns surfaced around loss of institutional knowledge and memory that would be created through Calgary Reads’ termination. One participant shared that previous knowledge had been lost as projects ended or changed hands and were worried about losing a centralized location for resources and knowledge about literacy in Calgary. Even in writing this report, some historical information was challenging to track down once the Calgary Reads website came to an end. The impact of these and other changes are not as profound as would be the case if Calgary Reads had simply closed its doors, but worries about saving stories, knowledge, and records seemed to be more acutely felt because there was, and is, a chance to mitigate losses. There was a sense of wanting to act on the opportunity to see all the seeds and all the insights gained over the years safely off to new homes.



**“Don’t make this your crisis plan. Land the plane. Don’t just wait to fly it until you have to bail out. Don’t just build nice parachutes. Land the plane.”**

Conversation Participant

**“If you are going out of business, you have nothing to give. It’s not a gift. Most not for profits can’t afford to accept a gift like that. There has to be a funding stream that is viable.”**

Conversation Participant

Successfully scattering the seeds to the seven partners seems to have hinged on trust and prior relationships stewarded in each case by a committed leader. Most people believed in the decisions made by Calgary Reads in selecting legacy partners even if they did not agree that a program was best suited to a specific partner. Many were reassured by the deep and strong roots of the partner organizations in the community. This ‘bees and trees’ model means that the programs had a good chance of being maintained and properly resourced, but also for the same reason that the programs would likely change over time.

Referring to the example of the Owerko Centre, which was one of the most controversial placements due to the pairing of a large institution with a more intimate home-like space, one conversation participant suggested that the Little Red Reading House would now have the backing of an entire University with the resources and learning-centred mindset to support its continued evolution. There is little chance, however, that the fidelity to original purpose and ‘vibe’ of the Reading House would be maintained under such a large institutional umbrella. While most seeds are intended to scale, if fidelity to the original purpose is the goal, it may be better in some cases to find another grassroots partner to maintain that fidelity - in this case, what might a community association or another small or medium-sized nonprofit be able to do with the space (or imagine a pitch competition for the right to assume ownership of the Little Red Reading House)?

The other hand-off partner that raised more eyebrows than elicited ‘aha’s’ was the choice of Rotary as a seed partner. Can a service club cognitively associated with a more aristocratic element of society pull off managing a grassroots book sale? There is also an optics issue here, vis-a-vis a nonprofit directly engaged in community service: As one conversation participant asked incredulously “The book sale is raising money for - wait, wait - Rotary??!” However, this pairing turned out to be hugely successful thanks to the long history and continued contributions of Calgary Reads’ Big Book Sale volunteers and the how Rotary complimented that process. Rotary not only relied on and learned from the long-serving Calgary Reads Book Sale Committee - led by two co-leads that continue to oversee and execute all operations with the help of hundreds of dedicated community volunteers -, but also brought their experience stewarding funds and working with volunteers, two essential components for the Big Books Sale. As one participant noted, the “Rotary and the book sale fit like a glove.”

From a human resources perspective, a happy ending for the Calgary Reads story was that its team all found new placements with the Seed Partners. This was certainly part of the success in the transfer of the LENA program to YW. Dissolution and other radical restructurings of organizations typically mean many people will lose their jobs, but the Dandelion Strategy included a focus on taking care of people *and* programs; Moreover, staff may feel more secure within organizations larger than Calgary Reads. The continuity of programs is another benefit to this approach.<sup>107</sup>

The combination of matching programs with partners who had skills, time, and other capacities, and alongside transferring over people with connections to legacy programs, appears to be key to successfully scattering seeds. Many conversation participants highlighted these protective factors as key to helping the seeds quickly achieve scale or provided reassurance that programs would not be diluted.

It should be noted, however, that each of these legacy partnerships would likely not have been possible if Calgary Reads or the Seed Partners were facing more urgent circumstances.<sup>108</sup> While funding was not as sustainable as desired, closure was by no means an imminent prospect; While Pinney would eventually leave her role, there was still capacity to hand things off in a meaningful way.



# Diversity in Dispersal: From Letting Go to Letting Grow

“Rough winds do shake the darling buds of May.” William Shakespeare

**“It is really important to just listen and let go, and let others make their own imprint”**

Conversation participant

**Sometimes you need to cut flowers down and replant them so they can be refreshed, have new space to grow, and ultimately thrive. But when you uproot something and place it somewhere else, there is a period where it's not clear whether the roots will actually take. Is the legacy partner able to grow? We had the right fertilizer - it was Steacy's mentorship and guidance.”**

Conversation Participant

Many conversation participants reflected on whether the Dandelion Strategy could be possible without a leader like Pinney, someone with a deep passion, strong relationships, and an ability to keep all the details straight among so many partnerships. While these talents were an obvious asset, relying so heavily on a leader can in other ways make the transition more challenging. Pinney has often referred publicly to Calgary Reads as her “fourth child”, which, on the one hand, explains her deep drive to see the seeds safely sent off but also surfaces concerns about how she could truly step back and let the seeds develop and grow outside of her care. Determining if and how the leader should transition in times of change is highly context dependent.

Some noted that Pinney had never demonstrated typical characteristics of “founders’ syndrome”, while others wondered if this could be a factor that limited more serious consideration of other possible avenues. One form of ‘rigidity trap’ (referenced earlier in the context of the Adaptive Cycle), is a ‘charisma’ trap, where an organization cannot imagine a future without its current leader. Founders syndrome - a normative concept - refers to the powers, privileges, and influences that are unique to the person(s) who founded a business (whether for-profit or non-profit), and/or that others attribute to the founder.<sup>109</sup> It is a sense of profound psychological ownership over a business from its founder(s), resulting in over-estimating the role the founder plays in the organization’s successes, and simultaneously underestimating the ability of staff, board members, or others to take on the responsibilities or to maintain the fidelity to the vision, goals or approach. Indeed, even when founders’ syndrome is present, the effects are not all negative. It can enhance stability within an organization, for example.<sup>110</sup> Founder’s syndrome results in potential gaps in the organization’s array of possibilities to adapt and evolve, and it is typically enabled (and exacerbated) by boards (and sometimes funders) who are deferential to the founder and unlikely to surface difficult questions or to circumscribe this strong sense of ownership. Among founder’s syndrome’s most dampening effects is on succession planning.<sup>111</sup>

Even among those who felt this may be a factor, it was strongly urged that Pinney continue to play a leadership role in the early literacy space, as a trusted changemaker with valuable insight and instincts. It largely appears that as complicated as a single transition of one job or organization to another can be - a CEO retiring, a merger, etc - the Dandelion Strategy is incredibly more complicated because of the number of partners. Rather than, for example, two CEOs negotiating the transition process and what that relationship will look like, there are multiple sets of relationships that need to be assessed, both practically and emotionally, for how the relationship will evolve or conclude. Nearly all conversation participants stressed that this strategy was therefore inconceivable without Pinney playing that central leadership and facilitation role, with Pinney in turn acknowledging the vital support of a talented, detail oriented, former Executive Director now consultant who supported all the moving parts.

The hand-off is a critical test of the ability to let go. A number of conversation participants noted that it will be critical for Pinney to be a *passive* resource - they will lean heavily on her expertise and program wisdom - but not to be an *active* resource, running quality control inspections informally or otherwise. And, importantly, to let the Seed Partners lead that process as much as possible. In other words, consultation is welcome and needed as the hand-off to Seed Partners takes shape, but not micromanagement.

A year into the Dandelion Strategy, Pinney continues to work 20-30 hours a week on various aspects of the hand-off. The dissolution itself proved to be more work than anticipated, three new websites with Seed Partners have been launched over the last few months, the Book Sale required significant mentorship and guidance, though Pinney is herself a Rotarian and will be joining Board as Childhood Literacy Director, and there is interest from many places in Pinney sharing insight and expertise beyond the legacy partners. While letting go is important, when a person knows their life purpose, with Steacy’s being early literacy, they can continue to make change in a variety of ways.



An additional risk that surfaced was that even though there was a desire to have a more sustainable funding model for Calgary Reads' legacy projects, spreading the seeds might paradoxically result in funding challenges with the Seed Partners as there was no guarantee that funding would follow the transfer. Participants noted that Pinney and the organization had been "good at spinning straw into gold to meet demand," but how would that change with the dissolution? Among funders and Seed Partners, some were not confident about funding pathways; Programs might no longer be eligible,<sup>112</sup> especially if partners modified them to fit within the new organization's culture and framework. Some funders had previously continued to support Calgary Reads programs as they changed over the years, but a seed partner might be more difficult to fund if the project had evolved to a point that it was now out of scope. Relationships built over time can support the accommodation of changes while 'new' partnerships may face stringent rules. Additionally, some donors, especially individuals in the community, might prefer giving to a local nonprofit named "Calgary Reads" rather than another local or national nonprofit or university campus even if the funds are directed at the same program, and even if fidelity to that original program's goals and parameters is maintained.<sup>115</sup> Impact counts, but often - as in any sector - brand value counts more.

The paradox regarding funding is that, while some continued funding plans can be (and have been) developed, the very act of supporting the seeds with established funding structures was seen by some as potentially limiting and controlling the path forward. Pre-committing to specific pools of funding could limit the ability to adapt the program to a new environment. As such, some noted that if Calgary Reads wanted to control how program parameters are set post hand-off they should just continue directly operating the program(s) instead.<sup>114</sup>

Reflecting back post-dissolution, some Seed Partners wished there had been more clarity about how and when information would be shared with funders and how to engage with legacy donors or funders. It may not be possible to provide access to donor lists in all cases, but partners can feel empowered and on more solid ground if they are informed about funding processes and information sharing early on.

Similarly, there was some desire to have more clarity about how the dissolution was going to unfold, as there was a need to balance creating desired outcomes<sup>115</sup> while not prescribing how those outcomes will be achieved too early in the process. Conversation participants often struggled to make predictions about scale and impact; remaining hopeful but unsure about outcomes beyond hoping that programs survived. Even in post-reflections there was some uncertainty about outcomes that went deeper than apparent stability and early indications that some initiatives were beginning to scale. Creating a shared and evolving definition of desired outcomes could be a valuable addition to future dandelion strategies.

Balancing needs and being familiar with charting new ground also applied to navigating legal aspects of the handoff. Rather than a more direct hand-off, as might be seen in a merger, some Seed Partners received physical assets while others carried forward more intangible processes. Certain aspects would clearly need drafted legal agreements and memoranda of understanding, but some areas were less obvious. For instance, did a seed partner need a formal signed agreement if they were adopting something intangible like a mindset or approach to their own programming? Encouragingly, questions around intellectual property were embraced with curiosity, without a strong sense that things were 'owned' by one group and would need to be transferred formally.

The legal transfer of the Little Red Reading House presented unique challenges as it is an innovative space that works, in part, due to the relationships and deep connection Pinney had to the community of Inglewood and local leaders. They were able to successfully turn a private residence into a community service, amidst bylaws and regulatory requirements, because of well-nurtured relationships and finding the right advocates who believed in the story of what the space could be. The house challenged expectations of where and how services could be delivered, and it will take work to continue to honour creative ways of serving the community.

Perhaps one of the most nuanced questions to explore was what to do with the Calgary Reads brand. Some felt strongly about retiring it, using it only in telling the story of the history of programs but not as a current name, while others saw an opportunity to repurpose it and unify the seeds under a banner of a city-wide Calgary Reads *movement*. Brands can carry a great deal of meaning, including an emotive connection or history with funders, as noted above, but also a connection to culture, staff, volunteers, and other stakeholders.<sup>116</sup>

Calgary Reads devoted considerable time to the actions that would accompany the spreading of the seeds, imbuing a sense of ceremony, celebration and storytelling to this event. As a result, it appears to have achieved a sense of closure and reassurance to help with the sadness felt at the loss of Calgary Reads.<sup>117</sup> Closure and celebration is an often overlooked part of any transition, yet Calgary Reads stands as an example of how to navigate this process well. Two wrap up events, a revamped Calgary Reads website, and multiple social media posts and videos explaining the process, were all employed, serving as celebratory memoirs and mementoes that gave people tangible ways to say goodbye while also having lasting reminders about the work that had been done (and still left to do). Thoughtful celebrations and keepsakes have the power to ease people through times of change,<sup>118</sup> and their existence shows intentionality and care. A Dandelion Button can remind Seed Partners of the legacy they are upholding while videos and a re-designed website redirecting to new sites can reassure clients and the public that they will still be able to find what they need.





# Legacy Scaling: A Framework for Success

As you read through the learnings of the Dandelion Strategy, you might wonder... “Is this right for my organization?”

The Dandelion Strategy is a unique approach, and a huge leap of faith. As a single example,<sup>119</sup> absent a larger pattern to draw conclusions from, it is difficult to draw learnings and lessons that can confidently be said to be replicable or applicable to broad swathes of the social impact world. That said, it is far from idiosyncratic - so many of the lessons and insights from this process mirror observed learnings in nonprofit mergers, and rhyme with the principles gleaned from collective impact, deep collaboration and social innovation broadly. As a note of reassurance, not only was the Dandelion Strategy seen by many as possible for many organizations, but also was viewed as a healthy tool that could help shake up other deeply rooted systemic issues.<sup>120</sup>

Unlike mergers, acquisitions, and straight-up dissolutions, there is no generic label for this kind of nonprofit exit strategy. One might call it ‘legacy scaling’, ‘legacy transfers’, ‘the phoenix approach’ (as in rebirth, rising from the ashes), or perhaps others will borrow ‘Dandelion Strategy’ and run with it (it is open source and free for the taking!).

Despite the uniqueness of this story, every nonprofit organization should assess and seriously explore such a legacy scaling option, especially if they feel frustrated at reaching a perceived ceiling to the impact they are able to make.<sup>121</sup> Nothing should expect to live forever, so rather than recoiling from the unthinkable - that your work may be finished or that you have reached the plateau of your impact in your current form - a much more realistic, resilient, anti-fragile, and potentially innovative frame of mind (and organization operating culture) is to frequently consider the possibility of exit as a meaningful leverage point for change. The dominant cultural ethos in North America seems to steer us away from thinking about endings; even the literature on creating and managing nonprofits rarely mentions how to close except in times of crisis.<sup>122</sup> But if you keep the possibility of a healthy closure in mind regularly and from the outset, ideally through a commitment to an end date (which can always shift, yet it is worth going through the exercise of selecting an end date),<sup>123</sup> or through ideation sessions about what *opportunities* might arise from a closure, you may be able to break free of the hamster wheel many nonprofits get stuck in.

As such, it is useful to summarize the main takeaways as a starting point for your organization to consider a similar strategy. The distilling of ‘keys to success’, ‘lessons for funders’, and ‘cautions’ is presented here in the form of a basic framework or checklist for other organizations to consider in designing, prioritizing and undertaking legacy transfers as part of dissolution. This framework draws from learnings discussed in the previous section, but it also builds on insights and recommendations from *Merging for Good*<sup>124</sup> as legacy scaling is just one of a suite of options organizations should consider throughout their lifecycle.

	Values and Culture
	Governance
	Legal/Regulatory
	Human Resources
	Financial
	Branding and External Communications
	Funder and Donor Stewardship
	Internal Communications
	Programming/ Front-Line
	Back-Office Operations
	Space
	Social Impact: Client Feedback, Data, R&D and Public Policy
	Finding Closure: Celebrating and Grieving the Legacy

Figure 4: Framework components outlined in *Merging for Good: A Case-Based Framework for Supporting Effective Nonprofit Amalgamations*

We recommend reviewing pages 8-12 from *Merging for Good* and reflecting on the additional prompts below. Certain aspects in the Amalgamation Considerations and Phases checklist become more or less prominent as one considers merging, amalgamating, or dissolving, and the sheer scale of scattering to multiple organizations means depth must be sacrificed for breadth. Partners should work together very early on to understand each of the components and requirements (funding, HR, leadership time, branding and communications, and so on), and collectively prioritize the steps of scattering the seeds. This will also help identify what is needed to move forward and what can or should be left to the legacy partners to design or redesign once the transfer is complete.

## What is Essential to Success?

**Intrinsic motivation vs. coercive drivers:** Mirroring findings in nonprofit mergers, the first ingredient of success starts with an intrinsic desire to willingly dissolve the organization and embark on this journey voluntarily. It is not likely to be successful if the drivers are coercively external - financial collapse, pandemic-induced burnout, etc. Clearly assess your context and confirm that your programs or initiatives truly are gifts for partners to seed and not burdens to save.

**Enthusiasm, commitment and openness of partners:** This is mainly about people, not organizations - if you work with people that are enthusiastic, committed and open, the question of which organizations are the right fit almost becomes secondary. If a legacy partner is tepid and needs a good deal of persuasion, this can be an early warning sign. Passion and enthusiasm are a must, as is grit and tenacity - legacy transfers require time, patience and continuity of players (staff turnover can kill momentum or set a transfer process back many months). All parties must be willing to share openly, honestly, and with a sense of curiosity and vulnerability, no matter how large and sophisticated the legacy partner is.

**Values and Culture:** Alignment on values is an essential predictor of success in any kind of strategic partnership. It is the “why” behind the work and the path forward,<sup>125</sup> and creates hope and trust to help the dissolving organization truly step back. Regardless of whether the seeds stay the same, post-transfer, evolve, or fail to thrive in their new home, there is reassurance in knowing the overarching vision is shared. Culture is a more challenging piece to navigate and the adoption of a piece of an organization - a transferred program, rather than a full merger or acquisition, may mean culture may only marginally shift, if at all. Taking on a new program, and potentially personnel, still represents a change. Make plans to support acculturation in this time of transition.<sup>126</sup> Big Sisters Big Brothers, for example, made a strong strategic and cultural shift to embed early literacy - an example of ‘scaling deep’.

**Trust:** So many of the Seed Partners commented on how deep their trust was in Pinney and Calgary Reads, and how critical this was to signing on to the Dandelion Strategy. The workshops created a container (usually) candid sharing and relationship-deepening helped embed this trust. Those partners that communicated regularly outside the confines of the workshop, both between each other and with Pinney, appeared to have the most successful implementation trajectory.

**Resource the hand-off:** No matter how brilliant or successful a particular program is, it is always - to some degree - a burden for a legacy partner to take on. It requires staff resources, acculturation, marketing and new outreach, and in some cases learning to work with an entirely new 'clientele'. This all requires money and/or staff knowledge. The dispersal of seed funds to Seed Partners in this case, alongside the decision to distribute book sale proceeds to the partners, helped incentivize and minimize friction in the transition. The partnerships where Calgary Reads staff were part of the transfer, joining the legacy partner organization, were given a huge boost (although this assumes that staff are at least as challenged as they were when working at Calgary Reads). As outgoing CEO, and the creative force behind most of the legacy programs, Pinney observed that a long, well-resourced runway is required: "Give the Seed Partners enough money to run the program for at least the first year, budget the time to help steward the transition, but also put some space between between you and the Seed Partners."

**Partner with the trees, but mind the grass:** Ensure that the legacy partners are sophisticated enough to be able to scale up and/or out, and yet receptive enough to understand and preserve the innovative components encoded in the grassroots DNA of the program. In the Dandelion dispersal, the YW was able to successfully scale up, integrating through a range of programs. The Canadian Literacy Foundation and United for Literacy are laying the groundwork to scale out across Canada (albeit in adapted form), and Rotary has piqued significant international interest, just in time to host the international convention of Rotarians in 2025.

**Collective movement making:** Too many collaborations fail to meet the minimum criterion for collaboration, ending up co-existing, with some communication, a modicum of coordination, and overtaken by the gravitational well of competition, an endemic structural feature of today's nonprofit sector.<sup>127</sup> Moving from a small, agile non-profit organization to a decentralized collective impact or systems change effort is not something that either happens naturally or quickly. Legacy partners must stretch themselves well beyond the boundaries of a normal "collaboration" to imagine the new frontier of change and possibility. As well, decentralization requires staying grounded as a movement, but not so much so that a backbone organization is required (otherwise, in a sense, the Dandelion Strategy would be self-defeating).

**Measure what matters:** Create a shared, but evolving, definition or success and outcomes. Each partner is establishing their own seed so having patience for the unique journey and being flexible and collaborative in who defines success. Part of the 'letting go' process is letting the new organizations determine their own measures of success.

**Lived experience:** Lived experience is part of any social innovation cookbook, and rightfully so. If you go through the significant effort of a legacy transfer, it is a perfect opportunity to stop along the way and evaluate whether the programs that are being transferred are still (or were ever) informed by those living the issue. If a lack of parental reading and storytelling (and or caregiver reading and storytelling) is at the root of the early literacy challenge, then do we understand the needs and life circumstances of parents and caregivers sufficiently?

**Work yourself outwards and upwards:** Nonprofit workers and leaders are often told to "work themselves out of a job", but what does that actually look like when the work is not finished? While many accepted and trusted that this was a good path for Calgary Reads, there was more hesitation around recommending the strategy outright to others. Some noted that it was natural for a literacy organization to explore and find a way to thoughtfully 'close their story' while acknowledging that the Dandelion Strategy was not inevitable. In this case, rather than keeping one entity as a leading voice, it made sense to push the efforts outwards and upwards.<sup>128</sup> Outwards by germinating seeds within other organizations and upwards by putting pressure on other parts of the system, including government, to better support nonprofits carrying a load that should have a higher presence.

**Finding closure: Celebrating and grieving the legacy:** The literacy sector knows better than any sector (perhaps alongside live theatre, book festivals, and writers' societies) the vital importance of narrative. Ceremony, ritual and celebrations that mark wider signposts are, in turn, essential to building narrative. While legacy scaling is exciting, it is essential to not just rush into a singular focus on the future. As we saw with Calgary Reads' wind-down celebration after 20 years of successes - pause to acknowledge and celebrate the work and impact of the legacy organization, and acknowledge the profundity of its closure.

## Lessons for Funders

**Don't walk away; lean in:** Most of Calgary Reads' funders were enthusiastic, albeit cautiously so in many cases, about the Dandelion Strategy. As such, there were supporters for either the reallocation of existing funds or new investments to help ensure maximum success.





**Cultivate continuity:** Where possible, try to steward the development of relationships with legacy funders and the commitment of funds to help see the legacy partners through at least a portion of their transition period. A given partner may not be well positioned to inherit the program and seek out brand new funding sources at the same time, and a flexible and continued commitment to funding provides time to establish roots before financial pressures hit.

**Steward the funding relationship around issues, not programs:** Instead of pitching program ideas, provide opportunities for funders to learn about the issue. Invite them to hear from thought leaders, researchers, activists and others in ways that connect them to issues, and the systems that keep the status quo in place. This way, when program labels, design parameters, or locations change, which will happen, funders are more likely to be connected to the cause rather than wedded to the program.

**Leverage funding into other sources of impact:** Funders are almost always more the funders. They have convening power, can exercise thought leadership and other kinds of influence, help build sector-wide capacity and increasingly are interested in pushing for, or underwriting, systems-wide change. Many foundations increasingly invest a portion of their investment pool in social finance and enterprise strategies that can scale impact.

## Cautions and Other Considerations

**Branding:** Legacy scaling, in many ways, is not unlike a major re-brand. The same thoughtful consideration should be given to how to approach the legacy organization's name and brand assets. In the case of Calgary Reads, although it was an organization, it could work just as well as a city-wide campaign slogan. However, there may be a desire to completely stop using the original brand to either end on a high note and have that clarity of closure, while at the same time protecting the legacy and limiting confusion. Either way, there may be value in carrying the brand forward (and/or sub-brands, as is the case in most of the Dandelion transitions) though perhaps in original ways. Be prepared to revisit expectations around brand and how it relates to each seed partner. The Calgary Reads brand ultimately was transferred to Rotary and the sale will continue to be called the Calgary Reads Big Book Sale. The Calgary Reads Early Literacy Advisory group will also continue to advise Rotary as they integrate childhood literacy as a priority area.

**Communications:** Deciding when and how to inform both internal and external stakeholders of the dissolution can be challenging with multiple legacy partners but can be managed well. The dissolving entity will decide how and when it communicates to its internal and external stakeholders, and each seed partner will need to determine their strategy that aligns with the group. Partners who have a long history collaborating with the legacy organization may not need as robust a communications plan as newer partners unfamiliar with the program.

**Legal/Regulatory:** For the organization going to seed, it is important to clearly identify the legal and regulatory aspects that affect your organization and specific programs. All partners should pay particular attention to timing and making sure there is space to accommodate the required processes of each seed partner and regulatory body. For example, the timing of voluntary dissolution with the Canada Revenue Agency (in the case of registered charities) should be carefully sequenced with dissolution of corporate or society status, as well as with respect to outstanding funder agreements, paying out vendors, disbursing legacy seed funds, and so on.

**Governance:** While boards may play a large role in other strategic partnerships, they likely have a much smaller role in legacy transfers, as was the case with Dandelion (with the exception of Rotary, which is a volunteer-run entity with a 'working board'). Some Seed Partners will need their board or, more commonly, their Executive Director/CEO to be part of the ongoing discussions while other partnerships may involve mainly or exclusively front-line staff. If one partner is receiving a toolkit or framework, the person responsible for the day-to-day implementation of it may be better suited to the Dandelion Strategy decision-making group. But if the 'scaling' ambition requires additional advocacy and movement-building, leadership needs to be part of this process, and enthusiastically committed to its success. Occasionally, it may also be advantageous to have board members carry over.<sup>129</sup> Some board members moved from Calgary Reads to join the boards of some of the Seed Partners, and a few conversation participants recommended other nonprofit legacy transfers embrace this, as it helps retain some of the institutional knowledge and provides an opportunity for legacy partners to enhance their governance with leaders already invested in the cause.

**Universities as legacy partners:** Universities, enjoying high public trust, influence, and typically generously resourced with sophisticated advancement and development, can be alluring legacy partners. On the other hand, they can be frustratingly bureaucratic, slow, cavalier, and seriously struggle with many of the ingredients for social innovation: Nimbleness, creativity, entrepreneurial spirit, and ear-to-the-ground grassroots orientation. Scholarly practices, incentives and metrics of success can dominate, and university advancement energy tends to be placed on the high net worth donors bearing high net worth gifts. A small nonprofit giving an entire house, lovingly decorated, and designed to fire a child's imagination, is a wonderful story. But such a gift is at risk of being submerged amid a sea of large research grants and multi-million dollar capital philanthropy.

**Founder proximity:** Finding the right distance between the founder stepping away entirely, and the founder continuing to exert influence is a tricky calibration. You want to glean as many of the insights and ingredients of the success of the original enterprise, while at the same time having scope to adapt, reconfigure and scale up and out. As Pinney notes, founders need to ask themselves "am I helping, or am I hindering?" Too little involvement means too little coaching and mentorship; too much involvement risks conflict or dependency.



# Ensuring Literacy Lab Success

“Dandelions don’t tell no lies...” Mick Jagger

“It’s important in this next phase that Steacy [Pinney] is doing work that is different enough from Calgary Reads. There’s an important story to be told about literacy.” Conversation participant

In 2024, the Trico Changemakers Studio will launch the Literacy Lab - a multi-year social lab with a focus on childhood literacy in Calgary. The Literacy Lab will bring together diverse community participants from across traditional boundaries, backgrounds and sectors who bring different perspectives and lived experience to the issue. Together, the Lab will dive into the patterns, structures and mindsets that are keeping the challenge entrenched in order to uncover root causes, identify systems intervention and test new ideas. The Lab will integrate the work and expertise of MRU faculty and engage students in the lab process throughout.

As of fall 2023, the overall lab structure, process and timeline are in development. The Studio Lab Design + Facilitation team will be reaching out to advisors, participants and contributors in early 2024.

## Social Labs

Social Labs are a systems-based approach to addressing complex social, environmental and economic challenges. They have three main characteristics<sup>130</sup>:

- They are social – they bring diverse actors from across society to collectively work on a complex challenge. In this case, imagine the principle players from each of the seven Calgary Reads legacy partners, key public entities like both school boards and the public library, a small number of funders, academics and policy experts, and ideally citizens who have lived experience as either parents or students/former students in the mix.<sup>131</sup>
- They are experimental – the team working in a lab uses an iterative approach (prototyping) to continually test, learn and expand their understanding.
- They are systemic – they attempt to come up with solutions that address the root cause of the problem, rather than dealing with symptoms or a part of the whole. Importantly, good social labs are not circumscribed *a priori* by government political will or funder priorities. Successful social labs are also successful at building systems insight through nurturing new relationships and deepening existing ones. Some, for example, follow (or are inspired by) the work of Otto Scharmer and the Presencing Institute, which developed *Theory U*.<sup>132</sup>

The First 2000 Days Network city-wide strategy report identified four key barriers that are hampering the ability to make collective impact on early childhood development.<sup>133</sup> While some are specific to early childhood development, many will be familiar to anyone working in any part of the social impact sector. These barriers should help provide context for why a systemic approach is needed:

- General lack of understanding of the importance of the early years;
- A disintegrated approach to early childhood development: At the provincial and municipal levels, there is no integrated approach to early childhood development.
- There is no provincial-led strategy or focus on the early years; and
- Disjointed funding environment: The local and provincial funding environments are not aligned, creating system-wide barriers to making changes.



A developmental evaluation of the Network also noted “the biggest sense of uncertainty emerged from understanding how the Network is supporting systems change”.<sup>134</sup>

Lessons from previous or concurrent social labs should also feed into the context-setting for the Literacy Lab. Not all social labs are successful. Some of the criticisms levelled at social labs by conversation participants included a concern that they can be ‘clubby’ - a clique or the ‘usual suspects’, and the inverse critique that they are too inclusive, failing to adequately honour the expertise of a core group who have been toiling in the field for years. Is there a process for incorporating meta-analytic or systemic research insights into the lab? Others note that too narrow an ambit, or too wide, can hamper success. Some asked why the *Thrive by 5* Early Learning Innovation Lab appeared to not ultimately be successful?<sup>135</sup> Why did it struggle to incorporate or to address root causes? What lessons can be derived from the Nonprofit Resilience Lab, currently co-convened by the Calgary Foundation and the Trico Changemakers Studio? Who from the current Seed Partner group will continue on in the Lab process? Who will need to be engaged, who is not currently a part of the Dandelion discussion?

As one study notes, “public engagement processes (such as Social Labs) require clearly defined roles and responsibilities; the goals and the steps to reach them have to be (co-)defined, and the public engagement process needs to be transparent at all times, communicating expectations to everyone involved from the very beginning.”<sup>136</sup> One conversation participant noted that the lab process could serve as an opportunity to field-build; To establish a new early literacy community of practice among many professionals and organizations.

## Reflections on the Future, and Past, of literacy:

**“Maybe we are moving away from traditional literacy, maybe we won’t see as many traditional readers as we once did because of the proliferation of so many other ways of communicating...but on the other hand, we do still need those little kids with their books. What a loss on a philosophical level.”** Conversation Participant

A broader conversation, beyond the scope of these pages, is our continuously evolving relationship with words, reading, and stories. A number of tensions and musings were shared by Conversation Participants, some of which are explored here.

As we engage in processes of truth and reconciliation, we are reminded of the importance of oral stories and other forms of storytelling beyond the ‘written’ word. How might we both acknowledge the benefits of reading and literacy while also valuing diverse approaches to child learning and communicating?

We also tend to prioritize the need to foster a *love* of reading, though some wonder “why do we need to ‘love reading’, we don’t talk that way about math?”<sup>137</sup> How might we shift our approach to foster engaged learners and normalize not being in love with reading? These questions become increasingly important as AI and ChatGPT raise questions about shifting competencies. Just as the calculator has shifted our expectations with math, begrudgingly to some, we have to clearly articulate the *why* of literacy.

The Institute for Community Prosperity’s 2023 Environmental Scan includes a chapter called ‘From STEAM to STREAM: Rediscovering Literacy in a Post-Text World’, which notes that - in our blind enthusiasm for STEM-focused education (particularly pronounced in Alberta), we have neglected reading and storytelling, the original and root form of all uniquely human learning, and the most integral to success in the information age.<sup>138</sup>

**“Relationships are so important. It takes time. Not just because of meetings and process. It’s the cultural stuff that’s hard. You think you understand it, but you really don’t.”**

Conversation participant

Some of the questions the Literacy Lab might explore include one or more of the following:

- How has the terrain of literacy changed in general, and specifically in Calgary?
- What might Calgary look like if all children had frictionless access to opportunities to read for pleasure, listen to stories, and interact with caring adults in a face-to-face setting, whether in the home or in the broader community?
- How might we include, understand, and support families where they are at, and in embracing literacy-based approaches at scale?
- How might we create accessible, safe, stable, enchanted, and joyous environments throughout the city where children develop a love of reading, writing and storytelling?
- How might we create a data ecosystem that is robust, shared, publicly accessible and useful for understanding the connections between literacy-based approaches in the early years, and success within formal education and later in life?
- How might we ensure that literacy professionals are well-supported (including well remunerated), and in turn support each other in collaborative, abundant work settings?
- How might we invest public and philanthropic resources in a shared effort to ensure Calgary is among the most literate and imaginative cities in the world?



# Final Thoughts

Social innovation comes in many forms and flavours. There are countless definitions and endless debates about what it is and what it is not. But distilled to its simplest essence, social innovation is *doing good, better*. *Doing good*, at least in the public imagination, is the domain of the nonprofit sector. Hence, the phrase “do gooder” (whether used derisively or approvingly).

But the way we do good better is often not obvious. Social innovation often emerges out of signals buried in the noise of highly visible trends and fads. Plus, the effectiveness and impact of that ‘good’, and in turn the scale of that impact, is hampered by many structural (and even deeper) forces - including mindsets, historical trajectories, cultural expectations, and caricatures. It is vexingly difficult for small nonprofits with good ideas and novel approaches to scale their impact. While there are always niche exceptions, in general we live with broken or suboptimal systems that work against breakthrough innovation emanating from grassroots nonprofit models.

As is the case with many aspects of our global *permacrisis* (last year’s Collins Dictionary Word of the Year), in order to have a flourishing future we need to let go of many things we hold precious. The Dandelion Dispersal is a case study that tracks an audacious, nearly taboo idea: that, in order to *do good better*, an organization might have to exit the scene; Self-immolate; Die a noble death, as a precondition to changing a system.

The dandelion metaphor is apt, although a dandelion, while a beautiful but fleeting thing, is to many people an ugly nuisance that must be eradicated. So perhaps an even more apt metaphor is the death of a tree - say a magnificent Douglas Fir - enveloped by mycelium arising from the forest floor, its nutrients absorbed and repurpose into the germination and growth of many more seedlings scattered throughout the forest. The once proud and precious tree, which the community cherished, has surrendered itself to the greater cause of a flourishing forest. Such is the way of life, perhaps even the very meaning of life. Which suggests that this experiment in biomimicry - this weedy wager - has a deeper, more profound logic.

It is too early to definitely declare whether the Dandelion Strategy is an unqualified success in scaling support, advocacy, and impact in early childhood literacy. But there are demonstrated early successes, other developments that hold tremendous promise, and a strong emerging consensus from Seed Partners and stakeholders that this was a wager worth making. In fact, the level of optimism one year in, versus at the outset, is not only higher, but more widespread. A robust analysis of outcomes would require re-engaging with all of the Seed Partners one year, five years, and much further into the future.

The explicit aim of the Dandelion Strategy to “live on for generations” carries no guarantee; All we can report on at this stage is the trajectory, which in most respects is highly encouraging. As well, an attempt to measure specific literacy outcomes among learners, and population reached, would add significantly<sup>139</sup>, as this case study relies on qualitative feedback from identified practitioners.

Some important questions remain:

- Will all of the Seed Partners continue to support the legacy programs well into the future, and will they be able to redesign the program to meet future or scaled-up needs, while maintaining sufficient fidelity to the original purpose or the program?
- Will the Seed Partners embrace early literacy with the same vigour, creativity, and originality that Calgary Reads had established a reputation for?
- Will the provincial government, child care providers, and public school boards rise to the challenge of helping meet systemic, structural gaps so that all students, no matter what their socio-economic backgrounds or parental circumstances, have far greater access to, and participation in, early reading?
- Will the Little Red Reading Room - arguably the most grassroots, community-embedded jewel in the Calgary Reads crown - be able to thrive under the stewardship of one of the largest organizations in the city?
- Will the national Seed Partners be successful in incorporating and adapting the legacy programs to scale nationwide?

The circumstances around this particular case study, and the ingredients of success, are in some ways quite specific and challenging to reproduce. The standard line - “more research is needed” - is almost too much of an understatement. Nonetheless there appear to be many practical, replicable, and otherwise useful insights, not just for those in the literacy or early childhood development spaces, but well beyond. As such, we hope that the Dandelion case study contributes to the corpus of new social R&D insights useful to social purpose organizations struggling to achieve scale and widespread impact. Consider this study not in isolation, but alongside insights on social sector mergers, collective impact, and deep collaboration. We hope it is also useful for those aiming to achieve systems-level change. Change that is desperately needed, in many ways, and in many realms of community life and in the quest to help human beings reach their greatest potential.

“Legacy. What is a Legacy? It’s planting seeds in a garden you never get to see” Lin-Manuel Miranda, *Hamilton: The Revolution*



# Appendix A: Methodology

Although this can be considered a case study, broadly speaking, we are not intending this to follow every convention or parameter of a business-school-style case study. Drawing from elements of developmental evaluation, as well as from our well-established experience at field-scanning and trend-scanning,<sup>140</sup> this report chronicles Calgary Reads' journey from an operating nonprofit through dissolution, focusing on the transfer of legacy program and knowledge components. As part of this, we examined the rationale and origins of the legacy transfer concept, progress to date, the potential to scale impact through strategic transfers and post-dissolution activities, and lessons learned along the way. It is meant to inform project protagonists, funders, the broader community of early childhood literacy practitioners, and the general public.

## Phase 1:

Video-conference-based conversations were conducted in Spring of 2022 with 20 key stakeholders with perspectives on this process, including select Calgary Reads personnel and board members, funders, legacy program partners, and others with an interest in either early childhood literacy or nonprofit dissolution, and who are aware of, or have worked in some partnership capacity with, Calgary Reads. The list of conversation partners was developed jointly with the CEO of Calgary Reads, and is included in the next Appendix. These conversations were intended to surface, but not necessarily be limited to, legal and financial considerations, timing and sequencing, questions of HR, governance, culture, strategic fit and community impact, intellectual property and open knowledge considerations, funding considerations (including the capacity of recipient entities), and ethical/philosophical questions.

The authors also participated in a number of scheduled meetings related to Calgary Reads' dissolution and its legacy transfer activities. We relied on Calgary Read's CEO to identify the most strategic (potentially informative) stakeholders to participate in these meetings.

The authors also consulted both academic and non-academic literature (including from think tanks, NGOs and foundations) on the topic of nonprofit dissolution, scaling-focused program transfers and agreements, and post-dissolution systems change efforts (of founders and/or where social labs or collective impact initiatives have replaced or built on efforts of pioneer organizations and changemakers), with particular reference where possible to Calgary and Canada, as well as highlighting the perils and successes of instructive experiences elsewhere. Literature was also consulted - extremely limited though it is - on (remotely) comparable or transferable learnings from the early literacy domain elsewhere. These insights are woven throughout the final document, rather than as a discreet "literature review" section.

A Phase 1 report was produced in December, 2022, and shared only with interviewees, funders, and key stakeholders. Unlike this Final Report, the Phase 1 report was not shared publicly.

## Phase 2:

A series of follow-up interviews were conducted with many of the first round of stakeholders, with some new and additional stakeholders consulted (a full list of interviewees is included in the Appendix following). Interviewees were asked to reflect on their journey experience and their overall perception of the Dandelion Strategy one year on. The authors also participated as observers in the last two workshops of the Seed Partners.<sup>141</sup> This report captures the insights from both phases.

## Quality Assurance/Program Review

Please note that this work does not constitute academic research, nor will it lead to an academic paper or presentation at an academic seminar or conference. Rather, this is instead considered the equivalent of a "program review", as it is focused on improving policies and practices within specific organizations, as well as within a subsector and a system. This form of review is specifically exempted from the requirement of approval from the MRU Human Research Ethics Board.

Nonetheless, as the Institute is conducting this work under the auspices of MRU, and in the furtherance of sound inquiry involving human respondents, the key principles articulated by the Human Research Ethics Board (including social value, informed consent, non-coercion, and positive risk-benefit) have been adhered to.

# Appendix B: Interviewees

Thanks again to all of the stakeholders that took the time to speak with us and offer valuable insight and advice. Also indicated below is whether the conversation was in 2022, 2023, or Both.

## Calgary Reads

- Carolyn Wendt, Staff, Calgary Reads (2023)
- Matt Knapik, Board member and Designer-in-Residence, Calgary Reads (Both)
- Monica Mochoruk, Board Chair, Calgary Reads (2023)
- Natalie Appleton, Staff, Calgary Reads (2023)
- Steacy Pinney, CEO, Calgary Reads (Both)
- Steve Allan, Member, Rotary; Champion, Calgary Reads (Both)

## Funding Partners

- Allison Schulz, Vice-President, Capacity Building, Calgary Foundation (Both)
- Jacqueline Harris, Social Risk & Investment Advisor, Chevron (2022)
- Jeri-Lynn Daniels, Regional Director, Community Marketing and Citizenship, Royal Bank of Canada (2022)
- Leanne Courchesne, Senior Advisor, Corporate Citizenship, Enbridge; previous Calgary Reads affiliation as Community Investment and Employee Engagement, Cenovus Energy (2022)

## Dandelion Legacy Partners

- Jodi McKay, Big Brothers Big Sisters of Calgary & Area (Both)
- Dr. Jodi Nickel, Professor of Education, Mount Royal University (Both)
- Manon Mitchell, Past President, Rotary Club (2023)
- Mike Colborne, [role], Rotary/Leg Up Foundation (2023)
- Richard Harvey, Regional Director, West & Prairies, United for Literacy (2022)
- Dr. Suzanne Graham, Director, Owerko Centre (2023)
- Dr. Suzanne Tough, Professor of Paediatrics and Community Health Sciences, University of Calgary (Both)
- Talia Bell, Vice President, Programs & People, YW Calgary (2022)

## Other Early Childhood/Early Literacy Leaders

- Ariel Siller, Canadian Children's Literacy Foundation (2023)
- Blythe Butler, Network Weaver, First 2000 Days Network (2022)
- Carlene Donnelly, Executive Director, CUPS (2022)
- Heather Robertson, Director of Service Design and Innovation, Calgary Public Library (Both)
- Michelle Clarke, Executive Director, Burns Memorial Fund (2022)

## Other Social Impact Leaders

- Jaclyn Silbernagel, Associate Director of Community Engagement, Vibrant Communities Calgary
- Julia Deans, CEO, Habitat for Humanity (2022)
- Lena Soots, Trico Changemakers Studio (2023)
- Mark Cabaj, Here2There; Tamarack (2022)
- Meaghon Reid, Executive Director, Vibrant Communities Calgary (2023)
- Robert Perry, Manager, Research and Client Services, Calgary Food Bank (2022)
- Sarah Walker, Leadership, Planning and Communication Consultant (Both)

# Endnotes

- 1 With regard to social impact, scale refers to efforts to spread a strategy in ways that challenge systemic problems. For more on the types of scaling strategies, access Darcy Riddell and Michele-Lee Moore. (2015). *Scaling Out, Scaling Up, Scaling Deep: Advancing Systemic Social Innovation and the Learning Process to Support It*. Page 2. [https://mccconnellfoundation.ca/wp-content/uploads/2017/08/ScalingOut\\_Nov27A\\_AV\\_BrandedBleed.pdf](https://mccconnellfoundation.ca/wp-content/uploads/2017/08/ScalingOut_Nov27A_AV_BrandedBleed.pdf)
- 2 We refer to the term social deficit in the sense described by Brian Emmett. (2016). *Charities, Sustainable Funding and Smart Growth: Discussion Paper*. Imagine Canada. <https://www.imaginecanada.ca/en/resource-download/Charities-sustainable-funding-and-smart-growth>
- 3 Alexa Briggs, Karen Ball, Kirsten Boda, Jamie Little, and Celia Lee. (2022). *Alberta's Nonprofit Sector: Too Essential to Fail*. Calgary Chamber of Voluntary Organizations (CCVO). [https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/637fa15fb9941d0aa267f2a4/1669308769500/CCVO\\_TooEssentialToFailReport.pdf](https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/637fa15fb9941d0aa267f2a4/1669308769500/CCVO_TooEssentialToFailReport.pdf). In addition, the most important funding source for the nonprofit sector in general is provincial government support, though it should be noted that Calgary Reads relied almost entirely on a combination of philanthropic donations, corporate sponsorships and earned revenue. Nonprofits in Alberta formerly benefitted from such provincial funding sources as the Wildrose Foundation and Community Lottery Boards, which no longer exist. Newer funding programs, such as the Civil Society Fund, are much smaller in scale.
- 4 Sharon Riley. (2023, January 24). "Era of uncertainty": How leaders in Canada's non-profit sector are preparing for 2023'. *The Philanthropist*. <https://thephilanthropist.ca/2023/01/era-of-uncertainty-how-leaders-in-canadas-non-profit-sector-are-preparing-for-2023/> Illustration of three people looking down into a magnifying glass
- 5 While there are many definitions of social innovation, perhaps the most widely shared definition, and serviceable with respect to this case study, is from the Stanford Social Innovation Review: "A novel solution to a social problem that is more effective, efficient, sustainable, or just than existing solutions and for which the value created accrues primarily to society as a whole rather than private individuals." James A. Phillips, Jr., Kriss Deiglmeier, and Dale T. Miller. (2008). "Rediscovering Social Innovation." *Stanford Social Innovation Review*. [https://ssir.org/articles/entry/rediscovering\\_social\\_innovation](https://ssir.org/articles/entry/rediscovering_social_innovation)
- 6 As one example, the blogpost based on research prepared for the Clore Social Leadership Program by Owen Jarvis and Ruth Marvel. (2021, October 13). "When Bees Meet Trees": scaling social innovation through existing organisations - guest post." *The RSA Blog*. <https://www.thersa.org/blog/2013/10/when-bees-meet-trees-scaling-social-innovation-through-existing-organisations---guest-post>
- 7 Calgary Reads. (2022a). *Report to the Community 2021-2022*. <https://indd.adobe.com/view/9315ec26-fb95-4db4-a37e-edf11931e460>
- 8 Definition of Read: "Reproduce mentally or vocally the written or printed words by following the symbols with the eyes or fingers," *Oxford Dictionaries*. (1990). *The Concise Oxford Dictionary*. Oxford University Press.
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- 10 International Literacy Association. (2021). *Literacy Glossary* [website]. <https://www.literacyworldwide.org/get-resources/literacy-glossary>
- 11 As examples, the World Economic Forum. (2015). *New Vision for Education Unlocking the Potential of Technology*. [https://www3.weforum.org/docs/WEFUSA\\_NewVisionforEducation\\_Report2015.pdf](https://www3.weforum.org/docs/WEFUSA_NewVisionforEducation_Report2015.pdf); or the Partnership for 21st Century Learning. (2016). *Framework for 21st Century Learning*. Battelle for Kids. <https://www.battelleforkids.org/networks/p21>
- 12 United Nations. (2022). *4: Quality Education* [website]. <https://www.un.org/sustainabledevelopment/education/>
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- 14 Janet Lane. (2023). *The Case for Literacy in Alberta*. Canada West Foundation. <https://cwf.ca/research/publications/report-the-case-for-literacy-in-alberta/>
- 15 Organisation for Economic Co-operation and Development (OECD), Statistics Canada. (2011). *Literacy for Life: Further Results from the Adult Literacy and Life Skills Survey*. OECD Publishing. <https://doi.org/10.1787/9789264091269-en>
- 16 Sharon Murphy. (2012). "Regaining Pleasure in the Teaching of Reading." *Language Arts* 89(5): pp. 318–328.
- 17 Lorraine Reggin, Penny Pexman, Sheri Madian, and Susan Graham. (2019, September 18) "Parents play a key role in fostering children's love of reading." *The Conversation*. <https://theconversation.com/parents-play-a-key-role-in-fostering-childrens-love-of-reading-121089>
- 18 Center on the Developing Child. "Brain Architecture" [website]. Harvard University. (accessed Jan. 16, 2023). <https://developingchild.harvard.edu/science/key-concepts/brain-architecture/>
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- 25 A meta-analysis of Head Start efficacy in 2019 revealed a positive, though somewhat marginal, cost-benefit return: Washington State Institute for Public Policy. (2019). Head Start: Benefit-cost methods last updated December 2019. <https://www.wsipp.wa.gov/BenefitCost/Program/272>
- 26 Stepping Stones targets kindergarten and older preschool students considered to be underachieving readers, based on a teacher's assessments and recommendations. Washington State Institute for Public Policy (2019). Stepping Stones to Literacy: Cost-benefit dashboard for Pre-K to 12 Education. <https://www.wsipp.wa.gov/BenefitCost/Program/1012>. By comparison, pre-Kindergarten learning programs that were not specifically literacy-driven showed a still very positive (1:4) but lower cost-benefit ratio). Meta-analyses of Early Head Start and Even Start programs that tend to clinicalize early 'intervention' instead of centering literacy, or fostering reading-for-pleasure, actually show a negative (or inverse) cost-benefit ratio.
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- 29 The Network was largely reliant largely on federal funding, which in turn was discontinued under the Harper government.
- 30 Even public libraries have had to pivot toward a fuller developmental spectrum approach, as one Alberta report notes "...expanding their preschool programming and broadening their focus from early language acquisition and literacy to encompass all areas of development." Government of Alberta. (2014). Final report of the Early Child Development Mapping Project (ECMap). Alberta Education, Early Child Development (ECD) Mapping Initiative.
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- 32 Donald G. Jamieson. (2009). National Strategy for Early Literacy (Summary Report). Canadian Language and Literacy Research Network. <http://en.copian.ca/library/research/nsl/summary/summary.pdf>
- 33 National Center for Education Statistics. (n.d.). Fast Facts: Knowledge and skills at kindergarten. <https://nces.ed.gov/fastfacts/display.asp?id=680>
- 34 Jamieson, 2009, National Strategy for Early Literacy, p. 5.
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- 36 Canadian Children's Literacy Foundation. (2022). The Role of Early Literacy in Early Learning and Child Care: A Survey of Early Childhood Educators. Toronto: Canadian Children's Literacy Foundation. <https://childrensliteracy.ca/cclf/media/PDFs/ECE-Survey.pdf>
- 37 Government of Canada. (2022). Investing in Our Future -National Progress Report on Early Learning and Child Care 2018 to 2019. <https://www.canada.ca/en/employment-social-development/programs/early-learning-child-care/reports/2018-2019-annual.html>
- 38 Government of Canada. (2017). Multilateral Early Learning and Childcare Framework. <https://www.canada.ca/en/employment-social-development/programs/early-learning-child-care/reports/2017-multilateral-framework.html>
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- 45 Government of Alberta. (2013). Together We Raise Tomorrow: An Alberta Approach to Early Childhood Development.
- 46 Lane, 2023. The latest PISA scores will be reported in December, 2023.
- 47 Alberta Education, Early Child Development (ECD) Mapping Initiative. (2014). Final report of the Early Child Development Mapping Project (ECMap). Government of Alberta. <https://open.alberta.ca/publications/6985264>
- 48 United Way Calgary and Area. (2022). "Helping kids succeed." <https://calgaryunitedway.org/impact/kids/>
- 49 Based on conversations and a scan of publicly available documents.
- 50 The Palix Foundation also works to close the gap "between the latest scientific knowledge about brain development, mental health, and addiction, and what is actually done in policy and practice." The Alberta Family Wellness Initiative (AFWI) was created to do just this, disseminating actionable information and learning on brain development. Palix Foundation. (n.d.). "Palix Foundation." <https://www.palixfoundation.org/>
- 51 Based on a CRA Charities database search: "Literacy" in Alberta. <https://apps.cra-arc.gc.ca/ebsi/hacc/srch/pub/advncdSrch>
- 52 First 2000 Days Early Childhood Development Network. (2019). A City-wide Strategy for Children: Calgary's Strategy for Children Aged 0-8. <https://research-4kids.ucalgary.ca/sites/default/files/teams/11/2.%20City%20Wide%20Strategy.pdf>
- 53 Brenna Atnikov and Monica Pohlmann. (2014). Imagine a City Where All Children Grow, Learn, and Thrive By 5 (blog post). Reos Partners, May 24, 2014. The lab utilized the process of Theory U, developed by Otto Scharmer of MIT's Sloan School of Management. <https://reospartners.com/imagine-a-city-where-all-children-grow-learn-and-thrive-by-5/>
- 54 Conversation participants were either unsure or disappointed with the lack of institutional follow-through on the Thrive by 5 process and results.



- 55 Jodi Nickel and Joy Chadwick. (2022). "Tutoring to build teacher candidates' competence as reading teachers." *Mentoring & Tutoring: Partnership in Learning*. p. 17.
- 56 Calgary Reads has been a partner on a number of research projects including: All Our Families Study: Understanding Development Across the Lifecourse, <http://allourfamiliesstudy.com/our-partners/>; Devitt, L. (2019). *Exploring a Literacy Partnership to Inform Educational Leadership: The Story of Calgary Reads* (Unpublished doctoral thesis). University of Calgary, Calgary, AB.; Jodi Nickel and Scott Hughes. (2020). *Learning to Teach Reading Responsively Through Tutoring*, Reading Horizons; Nickel and Chadwick, 2022, *Tutoring to build teacher candidates' competence*.
- 57 Perhaps the closest proxy in Canada is Strong Start, <https://strongstart.ca/programs/>, based in Waterloo, Ontario. Strong Start, like the much newer Canadian Children's Literacy Foundation, are both slightly smaller than Calgary Reads, in terms of annual revenue and expenditures (based on CRA data reported on T3010 charitable business returns). Some cities in North America, such as Boston, operate a range of early literacy programs and municipal government initiatives. Other cities sometimes append such programming to either the public library system or to a local public school board.
- 58 Calgary Reads. (2022, June 3). *A Dandelion Story: Calgary Reads is Spreading Early Literacy Across Calgary* [Media Release].
- 59 LENA. (2021). *LENA Start: About*. <https://www.lena.org/about/>
- 60 Information in this paragraph is gleaned from T3010 Returns, as reported on the CRA Charities database.
- 61 Calgary Reads. (2022b). *Our Dandelion Story*. [Website]. <https://calgaryreads.com/>
- 62 In recent years, nonprofits are appearing to merge at an increasing pace though not to the extent many predicted early in the pandemic. James Stauch and Cordelia Snowdon. (2021). *Merging for Good. A Case-Based Framework for Supporting Effective Nonprofit Amalgamations*. Institute for Community Prosperity. [https://www.mtroyal.ca/nonprofit/InstituteforCommunityProsperity/\\_pdfs/Merging-for-Good-1.pdf](https://www.mtroyal.ca/nonprofit/InstituteforCommunityProsperity/_pdfs/Merging-for-Good-1.pdf). Reflecting on nonprofit mergers and data gaps, Bruce MacDonald suggested that supports like federal funding helped nonprofits survive early in the pandemic and now we are seeing more closures since struggling nonprofits cannot dedicate resources to a merger exploration. Alberta Nonprofit Network. (2022, October 12). *ABNN Webinar – Cost of Inflation: Challenges, Sustainability, Recovery*.
- 63 This decline in corporate community investment is also in the context of an overall long-term decline in the combined value of institutional and private contributions to charity in Canada, referred to as the 'social deficit'. The social deficit is a term coined by Imagine Canada Chief Economist Brian Emmett. (2016). *Charities, Sustainable Funding and Smart Growth*. Imagine Canada. This 'social deficit' was super-charged by the pandemic, as outlined in the Calgary Chamber of Voluntary Organizations' (CCVO's) recent call to action: Briggs, Ball, Boda, Little, and Lee, 2022, *Alberta's Nonprofit Sector: Too Essential to Fail*.
- 64 As one example, Gunderson, L. H. and Holling, C.S (Eds.). (2009). *Panarchy: Understanding Transformations in Human and Natural Systems*. Island Press.
- 65 Rigidity traps are normally hard to escape due to, for example, emotional attachment, to a scarcity mentality, or even just based on a lack of knowledge of options. This case study hopefully results in one additional option for organizations to consider when they are stuck in rigidity traps of their own.
- 66 Blumberg, M. (2009). *Mergers and Amalgamations in the Canadian Nonprofit and Charitable Sector*. 22(1), p. 2.
- 67 For more on this relationship, see "For Funders: A Guide to Supporting Mergers" in Stauch & Snowdon, *Merging for Good*, pp. 29-30.
- 68 Another very practical challenge raised by Calgary Reads in recruiting the Library as a Seed Partner was that the Library was also going through its own CEO search at the same time. Since mergers, amalgamations, and other non-profit restructuring processes are difficult change processes ideally undertaken without other transition processes in tandem, (see *Merging for Good* for more on this) and Frontier College was also going through a CEO transition, Calgary Reads prioritized partners who were not in transition periods.
- 69 This quote and subsequent quotes in this section are reprinted from Calgary Reads' media release on the Dandelion Strategy, also published on the Calgary Reads website: <https://calgaryreads.com/>
- 70 Owerko Centre for Neurodevelopment and Child Mental Health (website). <https://research4kids.ucalgary.ca/owerko/about/vision-and-mission>
- 71 Rotary: Who We Are (website) <https://www.rotary.org/en/about-rotary>
- 72 BSBB was singled out for having a large and enthusiastic group of volunteers at the book sale.
- 73 All the Calgary Reads team found new placements with the Seed Partners. As a few examples, Steacy Pinney, as a member of the Downtown Rotary Club, Chaired the Book Sale Transition Team and will be joining the Rotary Board in a new role as Childhood Literacy Director.
- 74 Such a bold vision will require advocacy and institutional effort to overcome the inertia that post-secondary systems typically present.
- 75 This abstracted version of the adaptive cycle is somewhat different from the version that the partners used to plan and map, which had a more compressed cycle, encompassing all five workshops at various intervals along the Möbius loop.
- 76 Convened by Pinney in her role as Changemaker in Residence at MRU.
- 77 See as examples for Canada: Frederick Bird and Frances Westley. (2011). *Voices from the Voluntary Sector: Perspectives on Leadership Challenges*, Sharon Riley. (2022, January 24). "Canada's charitable sector: What to expect in 2022." *The Philanthropist*. <https://thephilanthropist.ca/2022/01/canadas-charitable-sector-what-to-expect-in-2022/>, For United States: Dan Pallotta. (2008). *Uncharitable: How Restraints on Nonprofits Undermine Their Potential.*; Alan J. Abramson Jun. 19, 2018. *Today's Charitable Sector and Its Roots and Challenges*. *Stanford Social Innovation Review*. [https://ssir.org/articles/entry/todays\\_charitable\\_sector\\_and\\_its\\_roots\\_and\\_challenges](https://ssir.org/articles/entry/todays_charitable_sector_and_its_roots_and_challenges)
- 78 Alexa Briggs, Karen Ball, Kirsten Boda, Jamie Little, Celia Lee. (2022). *Alberta's Nonprofit Sector: Too Essential to Fail*. Calgary Chamber of Voluntary Organizations (CCVO). [https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/637fa15fb9941d0aa267f2a4/1669308769500/CCVO\\_TooEssentialToFail-Report.pdf](https://static1.squarespace.com/static/5aef5b46cef3728571e6c46c/t/637fa15fb9941d0aa267f2a4/1669308769500/CCVO_TooEssentialToFail-Report.pdf)
- 79 For example, see Imagine Canada. (2022). *Our Diversity is Our Strength: Improving Working Conditions in Canadian Nonprofits*; and the section "On the Ropes: A Civil Society Forecast" in this past year's annual Institute scan: James Stauch. (2023). *The Age of Rage: 2023 Environmental Scan*. The Calgary Foundation and Institute for Community Prosperity.
- 80 This meta-analysis on nonprofit growth, for example, cites over 100 books and articles on the topic: Jiahuan Lu, Weiwei Lin & Qiushi Wang. (2019) "Does a More Diversified Revenue Structure Lead to Greater Financial Capacity and Less Vulnerability in Nonprofit Organizations? A Bibliometric and Meta-Analysis", *Voluntas* 30, 593–609. <https://doi.org/10.1007/s11266-019-00093-9>

- 81 Dorothy Norris-Tirrell (1997) Organization termination in the nonprofit setting: the dissolution of children's rehabilitation services, *International Journal of Public Administration*, 20:12, 2177-21794, DOI: 10.1080/01900699708525291
- 82 To learn more, see The Sprout Fund. (2018). Our Sunset. <https://www.sproutfund.org/program/sunset/>
- 83 Bernd Helmig, Stefan Ingerfurth, and Alexander Pinz. (2014). "Success and failure of nonprofit organizations: Theoretical foundations, empirical evidence, and future research", *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 25, 1509-1538.
- 84 Wolfgang Bielefeld. (1994). What affects nonprofit survival? *Nonprofit Management and Leadership*, 5(1), 19-36. <https://doi.org/10.1002/nml.4130050104>
- 85 For example, Susan Kenny Stevens. (2001). *Nonprofit lifecycles: Stage-based wisdom for nonprofit capacity*. Minneapolis, MN: Stagewise Enterprises.
- 86 Riddell and Moore, 2015, *Scaling Out, Scaling Up, Scaling Deep*, p. 2.
- 87 Riddell and Moore, 2015, *Scaling Out, Scaling Up, Scaling Deep*, p. 3.
- 88 Collective impact is a set of methodologies and tools that bring community groups together in ways that amplify their ability to achieve lasting positive social change.
- 89 Mark Cabaj. (2018) What We Know So Far About Evaluating Efforts to Scale Social Innovation. Tamarack, p. 1. <https://www.tamarackcommunity.ca/library/evaluating-efforts-scale-social-innovation>
- 90 Data obtained from the CRA Charities database, last accessed Nov. 28, 2022. In all, over 46,000 organizations have been revoked, so just over half of this is CRA-initiated revocation (usually from failure to file), whereas the 22,767 number refers charities who notified the CRA of their dissolution and went through the proper channels to voluntarily expunge their charitable status. <https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyAdvncdSrch>
- 91 An area for further inquiry could be the analysis of financial records of charities in the years leading up to dissolution, and it would be interesting to see what patterns emerge between organizations that voluntarily revoke and those which CRA revokes due to failure to file.
- 92 Ernst Friedrich Schumacher. (1973). *Small Is Beautiful: Economics As If People Mattered*. London: Blond and Briggs.
- 93 This study was completed in partnership with United Way of Calgary and Area. Megan Davidson. (2023). *Outgrowing the Flowerpot: How might we create space for grassroots, community-led approaches in Calgary's larger systems of care?* Institute for Community Prosperity, Mount Royal University.
- 94 Lex Paulson. 'Social innovation and bottom-up power', in Stephen Boucher, Carina Antonia Hallin, Lex Paulson (2023). *The Routledge Handbook of Collective Intelligence for Democracy and Governance*. p 342. <https://doi.org/10.4324/9781003215929>
- 95 Paulson, 2023.
- 96 Paul Mason. (2017) 'A simple people's plan can replace May's flawed Brexit strategy.' *The Guardian* <https://www.theguardian.com/commentisfree/2017/may/01/peoples-brexit-plan-replace-mays-flawed-strateg-juncker-leak-june-alternate>
- 97 As one example, James Stauch. (2023). Diagnosing the Social Innovation Challenge in Universities. *Social Innovations Journal*, 16(1). Retrieved from <https://social-innovationsjournal.com/index.php/sij/article/view/5378>
- 98 The Canadian Literacy Foundation was "founded in 2017 by Heather Reisman, founder and CEO of Indigo and Chair of the Indigo Love of Reading Foundation, and Heather Munroe-Blum, Chairperson of the Canada Pension Plan Investment Board" (website, accessed Nov. 13, 2023) <https://childrensliteracy.ca/About-Us/Our-Story>
- 99 Calgary Reads. (2022c). *Report to Community: From Small Seeds, Big Things Grow*.
- 100 Conversation participants; Meaghon Reid and Steacy Pinney. (2022, June 22). "Literacy & the Dandelion Strategy." In *Let's Talk Poverty*. Podcast. <https://enoughforall.ca/podcasts/literacy-and-the-dandelion-strategy>
- 101 Reid and Pinney, 2022, "Literacy & the Dandelion Strategy."
- 102 For an excellent analysis of the layered growing crisis in nonprofit talent and leadership, see Ontario Nonprofit Network. *The Nonprofit HR Crisis* (website). 2022. <https://theonnc.ca/nonprofit-hr-crisis/>
- 103 For a detailed exploration into the barriers faced by nonprofits, including recruitment challenges, see Dan Pallotta. (2013). *Uncharitable: How Restraints on Nonprofits Undermine Their Potential*. Proponents of "Effective Altruism", a popular ethical framework among Silicon Valley philanthropists, posits - not without controversy - that it is more ethical to take the high-paying private sector job so you can have more impact with your money than scraping by as a nonprofit professional.
- 104 Conversation Participant.
- 105 One framing is that it is the parent's role to foster the love of reading while it is the school's responsibility to teach the mechanics of reading, Pamela Paul and Maria Russo. (2019). *How to Raise a Reader*. Workman Publishing. P. 48.
- 106 William Bridges Associates. *Managing Transitions* (website). <https://wmbridges.com/about/what-is-transition/>
- 107 Calgary Reads also aligned with recommended practice by seeking opportunities for their board members to explore positions with the Seed Partners: "It is advisable in most circumstances for at least one or two Board members from one organization to join the other. This is a way of demonstrating support for the new alliance and for ensuring that there are those at the decision-making table who understand the history, values, culture and services of the 'old organization' or of their programs." Elaine Forbes and Cynthia Manson. (2007). *Innovate, collaborate or die: how to create an alliance or merger for a stronger, more effective non-profit*. p. 64.
- 108 For more on trajectories around closure including potential for organizations to turnaround or revitalize their programs, see John Brothers and Anne Sherman. (2011). *Building Nonprofit Capacity: A Guide to Managing Change Through Organizational Lifecycles*.
- 109 Stephen R. Block, & Steven Rosenberg, S. (2002). "Toward an understanding of founder's syndrome: An assessment of power and privilege among founders of nonprofit organizations", *Nonprofit Management and Leadership*, 12(4), 353-368. <https://doi.org/10.1002/nml.12403>
- 110 Leona English, and Nancy Peters. (2011). "Founders' syndrome in women's nonprofit organizations: Implications for practice and organizational life." *Nonprofit Management and Leadership*, 22(2), 159-171. <https://doi.org/10.1002/nml.20047>



- 111 Coutanya Moulry. (2019). *The Experience of Founder's Syndrome in Nonprofit Organizations Founded by Women* (PhD dissertation). Walden University.
- 112 Although writing about mergers, Blumberg noted that some donors may oppose mergers as the new entity “may not be attractive to funders or even eligible for certain funding.” (2009). *Mergers and Amalgamations in the Canadian Nonprofit and Charitable Sector*. 22(1), 1–20.
- 113 Universities, for example, can charge large overhead costs of often 30 or 35%, when ironically it should be the smaller nonprofits that should be encouraged to build in significant core or administrative costs.
- 114 Conversation Participant.
- 115 Participants benefit from clarity about outcomes and where they want to be, David La Piana. (2020, January 14). *The Risk and Rewards of Mergers as a Nonprofit Growth Strategy*, Podcast. [https://ssir.org/podcasts/entry/the\\_risk\\_and\\_rewards\\_of\\_mergers\\_as\\_a\\_nonprofit\\_growth\\_strategy#](https://ssir.org/podcasts/entry/the_risk_and_rewards_of_mergers_as_a_nonprofit_growth_strategy#)
- 116 “For nonprofits, brand is often important. It may count with funders, elicit trust from clients, and attract volunteers, board members, and talented staff. Brand can also be about how an organization sees itself—and integral to a nonprofit’s culture,” Katie Smith Milway, Maria Orozco, & Cristina Botero Spring (2014). *Why Nonprofit Mergers Continue to Lag*. [https://ssir.org/articles/entry/why\\_nonprofit\\_mergers\\_continue\\_to\\_lag](https://ssir.org/articles/entry/why_nonprofit_mergers_continue_to_lag)
- 117 As noted in Stauch and Snowdon, 2021, it is vital to properly grieve and mark the winding down of an organization, as there is an emotional and almost spiritual attachment for many people closely connected to that organization.
- 118 See subsection “Rule 4: Celebrating the Success,” in William Bridges and Susan Bridges. (2016). *Managing Transitions: Making The Most of Change*. 4th Ed. Page 81.
- 119 Based on our scan of available literature and insights from Conversation Participants. As mentioned previously, some were reminded of The Sprout Fund’s sunset strategy, though this largely philanthropy-based.
- 120 When asked if this would be possible for other organizations and/or applicable in systemic issues beyond literacy, Conversations Participants noted that while it was not necessarily a prescription for success, the strategy is an innovative tool that can be used across sub sectors.
- 121 Conversation Participants, Geoff Revell. (2021, September 16). “Exit Strategies.” *Stanford Social Innovation Review*. [https://ssir.org/articles/entry/exit\\_strategies](https://ssir.org/articles/entry/exit_strategies)
- 122 Brothers and Sherman note that in other frameworks “the “closing” area is not part of the lifecycle but more of a chute for organizations that are no longer viable.” Brothers and Sherman, 2011. *Building Nonprofit Capacity*.
- 123 Conversation Participants; Revell, 2021, *Exit Strategies*.
- 124 “Amalgamation Considerations and Phases,” page 9.
- 125 “Amalgamation Considerations and Phases,” page. 14.
- 126 For insights into navigating change and shifts, see the chapter “Launching a New Beginning” in Bridges and Bridges, 2016, *Managing Transitions*, Pages 65–86.
- 127 The Studio used Tamarack’s excellent work on collaboration, outlining the difficult work and painful shifts that must happen to move along the continuum from competition, the nonprofit default setting, to collaboration or integration, the latter two requiring levels of trust that must be build intentionally, continuously, over a long period of time. See Tamarack Community. *TOOL: The Collaboration Spectrum* (website, accessed Oct. 7, 2023). <https://www.tamarackcommunity.ca/library/collaboration-spectrum-tool>
- 128 Riddell and Moore, 2015, *Scaling Out, Scaling Up, Scaling Deep*, p. 2.
- 129 Forbes and Manson, 2007, p. 64.
- 130 These three features are distilled from Frances Westley, Sam Labin, et al. *Social Innovation Lab Guide*. Waterloo Institute for Social Innovation and Resilience. 2016; as well as Zaid Hassan’s *Social Labs Revolution*, the Omidyar Network’s *Systems Practice Handbook*, and the MaRS Solutions Lab.
- 131 A US-based case study of a social lab-esque approach - the New Britain Early Childhood Collaborative in Connecticut - notably involved parents alongside heads of local nonprofits, board of education officials, foundation representatives, academics, and community organizers. The multi-year process was initiated in response to the finding that only 36 percent of third-graders could read at grade level and only 10 percent of children entering kindergarten were assessed as fully ready. Christopher Keevil & John Martin. “How to Organize Alliances of Multiple Organizations: Part 2”, *Stanford Social Innovation Review*. March, 2012. [https://ssir.org/articles/entry/how\\_to\\_organize\\_alliances\\_of\\_multiple\\_organizations\\_part\\_2](https://ssir.org/articles/entry/how_to_organize_alliances_of_multiple_organizations_part_2)
- 132 C. Otto Scharmer. (2007). *Theory U: Leading from the Future as it Emerges*. The Society for Organizational Learning, Cambridge, MA.
- 133 The four barriers are outlined on pages 6-7, *First 2000 Days Early Childhood Development Network*. (2019). *A Citywide Strategy for Children: Calgary’s Strategy for Children Aged 0-8*. <https://research4kids.ucalgary.ca/sites/default/files/teams/11/2.%20City%20Wide%20Strategy.pdf>
- 134 Samantha Berger. (2017, November). *First 2000 Days Network: Developmental Evaluation Report*. <https://research4kids.ucalgary.ca/sites/default/files/teams/11/5.%20Developmental%20Evaluation%202017.pdf>
- 135 A decade after the Thrive by 5 lab was convened, there is arguably less investment in early learning, notwithstanding the federal daycare strategy.
- 136 ilse Marschalek, Elisabeth Unterfrauner, Lisa M. Seebacher, Margit Hofer, and and Katharina Handler. (2023) ‘Social labs as good practice for transdisciplinary engagement processes research and innovation’. *Research for All*, 7 (1), 4. DOI: <https://doi.org/10.14324/RFA.071.04>
- 137 Conversation Participant.
- 138 Stauch, 2023.
- 139 Such an analysis is beyond the expertise of the Institute or the ambit of the work in this case study, and would require engaging academic researchers with subject matter expertise.
- 140 As examples, our past publications *The Right to Eat Right: Connecting Upstream and Downstream Food Security in Calgary* (2021) and *Merging for Good: A Case-Based Framework for Nonprofit Amalgamations* (2021) capture how literature and interviews are melded into a framework-focused document.
- 141 It was felt that the presence of the case study authors in the first two workshops would hamper open discussion and relationship-building among the Seed Partners.