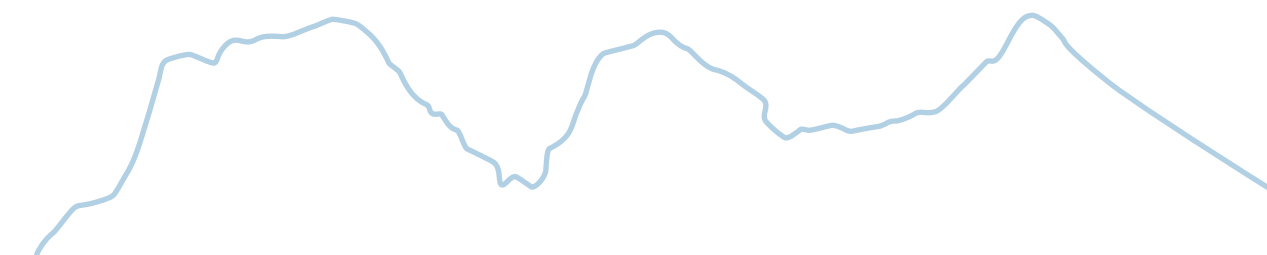




Nonprofit Resilience Lab

FINAL SUMMARY 2021 - 2024



In the spirit of reconciliation, healing, and reciprocity we acknowledge the traditional territories of the Siksikaitsitapi — the Blackfoot Confederacy, and the people of Treaty 7 territory, including the Siksika, the Piikani, the Tsuut'ina and the Ihyarhe Nakoda First Nations. We acknowledge that this land is also home to the Otipemisiwak Metis Nation of Alberta.



Gratitude: Lab Partners, Collaborators + Participants

The Nonprofit Resilience Lab took place over 3 years (2021-2024), with many brilliant minds, committed hearts and dedicated hands. The work of diving into and addressing complex challenges within our communities is not for the faint of heart. This work is messy, non-linear, sometimes confusing, and always an incredible learning journey. Social labs require stepping outside of the box of business as usual. A lab requires courage to try new ways of thinking, being and doing, as well trust in the process and in each other.

Deep gratitude to Calgary Foundation for generously supporting the lab, courageously partnering on a multi-year project and embracing all the messiness, complexity and uncertainty that comes with systems change work.

Heartfelt thanks to our Guide Group and Co-Designers, who not only contributed their time, resources, insights and labour to this project, but who also embraced the complexity and uncertainty of the journey. Thank you for asking big questions and taking bold action. Your commitment to the betterment of our community is inspiring.

Throughout the 3 years of the lab, there were many students and community members who touched and contributed to the project in a myriad of ways through interviews, workshops, document sharing, research, video production, photography and more. Thank you for your generous contributions.



The Lab Team



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INTRODUCTION

In 2021, Calgary Foundation, in partnership with the Trico Changemakers Studio at Mount Royal University (MRU) embarked on a multi-year social lab to explore how we might reimagine and transform how the nonprofit sector co-creates thriving and resilient communities in the context of increasingly complex pressures and challenges. Using a systems-based, co-creative approach, the lab set out to deepen our understanding of the complex challenges facing the social sector and focused on building resilience and adaptive capacity while prototyping, testing and implementing solutions.

"The nonprofit sector is one that allows itself to get a 60-70% grade and that's okay. That's unsettled me for decades. We have to disrupt this, we have to do better for both funders investing in the work and the frontline staff that are doing the work."



LAB INTRODUCTION VIDEO
SCAN HERE TO WATCH

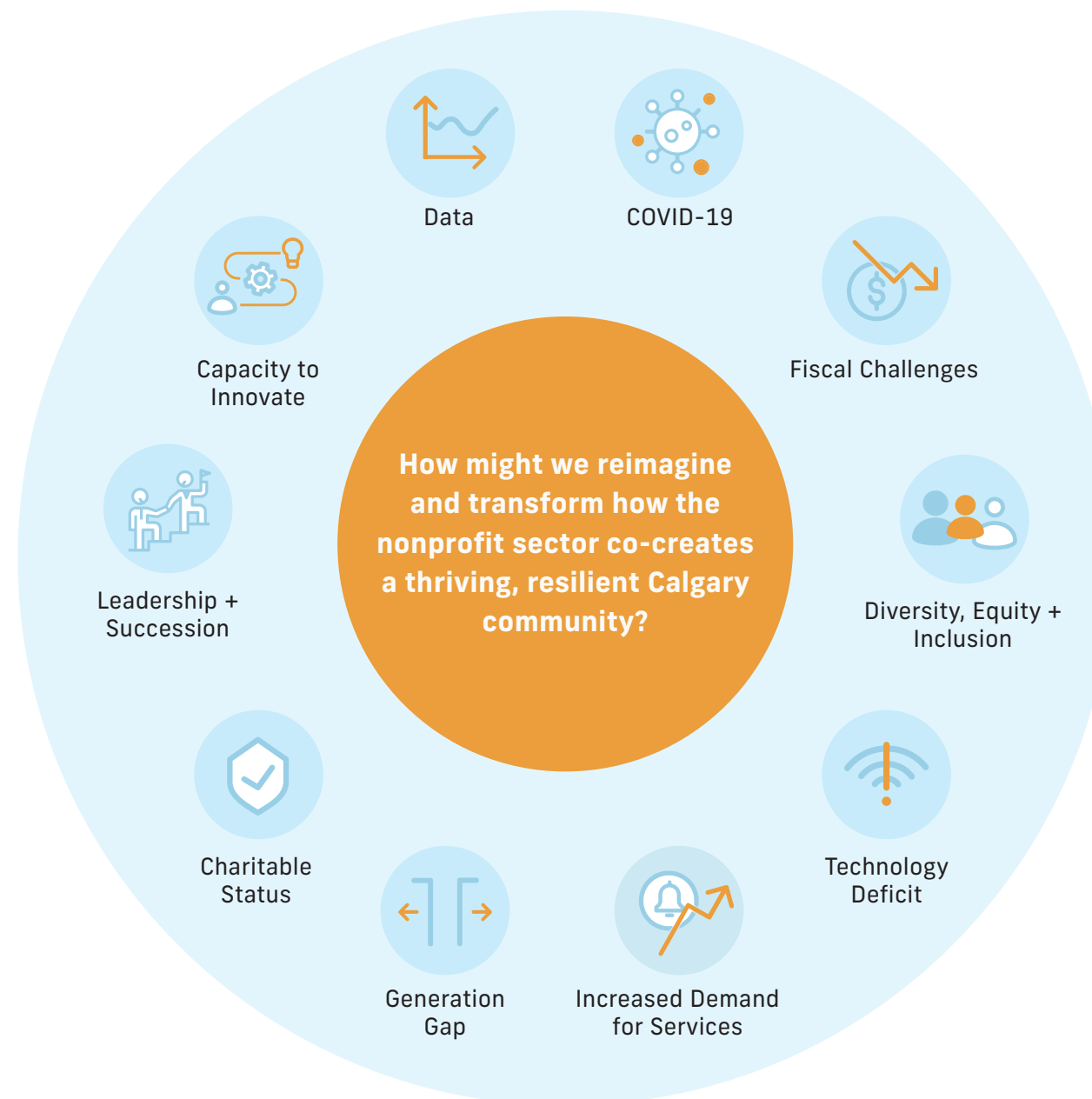
The Challenge + Context

Calgary's nonprofit sector is navigating increasingly complex and intersecting challenges while trying to meet rising demand for services. The rapid rise of COVID-19 not only created new challenges within the nonprofit sector, but served to highlight and exacerbate pre-existing issues that have challenged the sector for decades.

The fiscal challenges of decreasing donations, declining corporate sponsorships, and restricted use of funds make it difficult for organizations to maintain adequate staffing and deliver on programs while meeting increasing needs in the community. The charitable model itself limits the ability of organizations to generate or diversify revenue at a time when diverse revenue streams are needed more than ever to ensure long term sustainability. The pandemic revealed a technology deficit within the nonprofit sector as many organizations struggled to transition to online operations and program delivery. Furthermore, there is a plethora of data, but a lack of meaningful analysis creating blind spots within the sector. Many of these factors challenge the sector's ability to innovate and respond creatively to changing contexts and circumstances.

The nonprofit sector as a whole is grappling with issues of diversity, equity and inclusion as well as leadership and succession as the boomer generation retires and a new generation with different values, priorities approaches and perspectives steps to the fore.

The Guiding Question



How Might We...?

How Might We (HMW) questions help us frame a challenge in a way that we can start to enter into possibility together. HMW questions were conceived by Min Basadur and popularized by the design firm IDEO, as well as the Stanford d.school. The question framing is intentional and each word has significance:

- **How** assumes that finding solutions is indeed possible.
- **Might** gives us permission to try things out - some ideas might work, some might not, and that is okay. Solutions might come from many places. The importance lies in trying, learning and iterating.
- **We** reminds us that this is collective work that requires many different perspectives and invites us to ask: who else needs to be involved?

A New Kind of Collaboration

Calgary Foundation and Trico Changemakers Studio

Since 1955, Calgary Foundation has been nurturing a healthy, vibrant, giving and caring community. The Foundation facilitates collaborative philanthropy by making powerful connections between donors and community organizations for the long-term benefit of Calgary and area. Calgary Foundation inspires philanthropy, supports the charitable sector and builds a permanent endowment to address the current and future needs of people in our community.

By applying resources, expertise, and leadership, Calgary Foundation acts as a catalyst and convener, creating a meeting place that fosters partnerships to build a strong charitable sector that serves the needs of all members of the community. Calgary Foundation is committed to meeting the needs of the community today while equipping organizations with the tools and knowledge to address the complex social challenges in our community.

The Trico Changemakers Studio (the Studio), located at Mount Royal University is a social innovation, collaboration and learning space at the intersections of campus and community. The Studio brings together community participants, students and faculty from across disciplines, sectors and backgrounds to tackle complex social and environmental challenges. The Studio offers impact facilitation services to organizations, agencies and businesses in Calgary and across Alberta looking to deepen their understanding of systems change and social innovation and create greater social impact in our community.

Calgary Foundation and the Trico Changemakers Studio began working together in 2018 to bring a systems perspective to the Foundation's reconciliation journey. Since that time, the two organizations have worked together on numerous projects to expand and deepen learning and application of systems thinking, social innovation tools and practices to address various social issues.

Shortly after the initial COVID-19 lockdown in the spring of 2020, Allison Schulz, Vice President of Capacity Building at Calgary Foundation and Lena Soots Haley, Director of the Trico Changemakers Studio sat down to discuss the complexity of challenges faced by nonprofit organizations in Calgary and the social sector as a whole. Complex challenges are not new to the nonprofit sector, however, the pandemic and global social justice movements such as Black Lives Matter, have magnified the deep inequities and barriers in our community and have highlighted the need to reimagine how we work together toward transformative change.

Building on our strong foundation of collaboration and our shared commitment to systems change, Calgary Foundation and the Trico Changemakers Studio decided to combine resources and expertise to create a supportive space for diving deep and examining the complex challenges facing the nonprofit sector. The Nonprofit Resilience Lab was launched in January 2021.

The Non-profit Resilience Lab is not owned by Calgary Foundation or the Trico Changemakers Studio – our shared role is to convene, provide resources as well as design and facilitation expertise to support organizations in the change process. We prioritize inclusion and the removal of barriers for organizations to participate in this work, with a focus on co-design and a community model of care that supports organizations in their participation without compromising their services or stretching their staff. We believe that innovation cannot happen off the side of the desk, so we are intentionally creating new spaces and supporting new ways of working together.

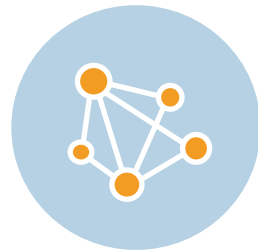
What is a Social Lab?

Social labs are an approach to addressing complex social, environmental, and economic challenges. Complex challenges are multi-dimensional, constantly changing, interconnected, non-linear and.... messy. In a social lab, we bring together diverse participants from across traditional boundaries who bring different perspectives to an issue. Together, we dive into the patterns, structures, and mindsets that are keeping a particular challenge entrenched in order to uncover root causes and take action. In the lab process we are purposefully experimenting and learning throughout in order to test, adapt and iterate on our ideas. This approach allows us to invest in our highest potential solutions with a greater degree of confidence. Through the process, we are building trust and increasing collaboration, building capacities, knowledge and skills, and co-creating solutions.

In essence, social labs are 3 things:



SYSTEMIC: We seek to understand the systems, connections and dynamics contributing to and upholding a particular problem instead of looking at problems in isolation. At the Nonprofit Resilience Lab, we started this process with an in-depth systems map, based on the stories and experiences of Calgarians in different parts of the sector.



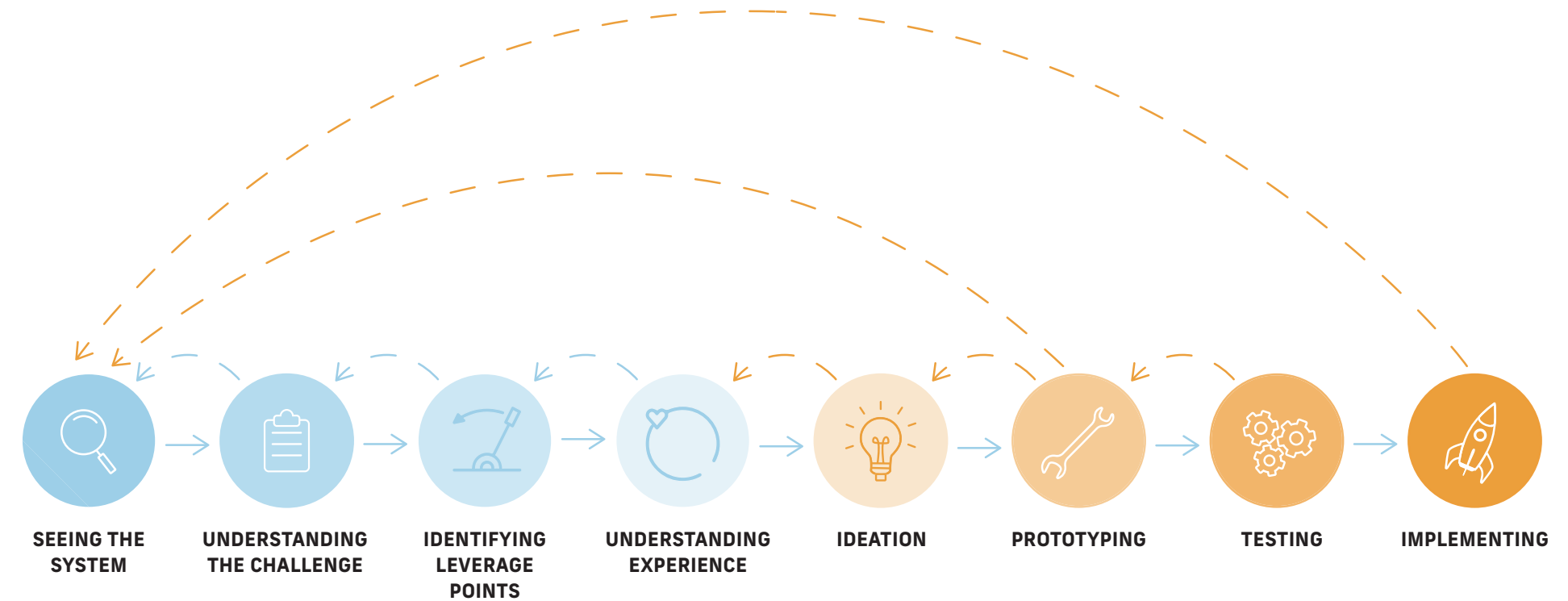
SOCIAL: Problems cannot be solved by one individual or single group. In our process, we focus on relationships, connections and building trust. By doing this, we elevate the participation and voices of those with lived experience. The Nonprofit Resilience Lab uses participatory design methods to engage a diverse community in the facilitation process.



EXPERIMENTAL: Complex problems have no clear answers and do not only have one solution. In a social lab, creativity is used to collectively generate new ideas and co-design potential solutions. Through continuous experimentation, learning and improving on ideas we can discover something with significant impact.

The Lab Process

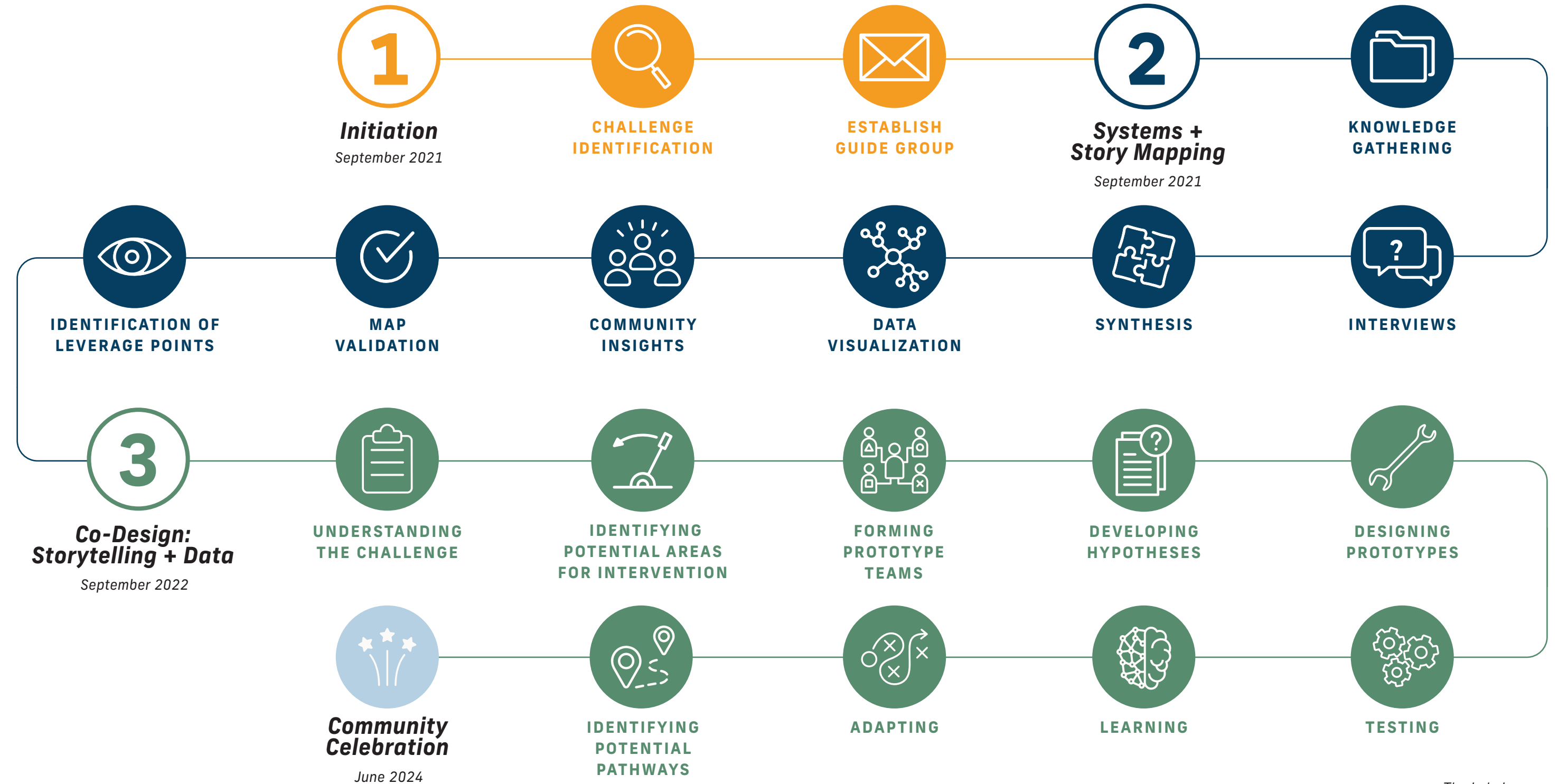
The lab process is iterative and emergent. Although the overall trajectory of the process takes us from understanding the challenges within the system to testing and implementing solutions, we are constantly moving through a process of listening, observing, responding and iterating.



THE LAB JOURNEY

“It was an impressive group of people that were part of the Guide Group. I was relieved we weren’t talking about nonprofit governance, funding, volunteer capacity, managerial and human resource challenges. Instead we talked about the way we do the work and the norms around our work that need re-examining so we can build resilience into the culture of the nonprofit sector.”

Guide Group Member



PRE LAB

The Guide Group

As we launched the lab, we established a Guide Group consisting of 12 community leaders with different perspectives and experiences with the nonprofit sector. The purpose of this group was to bring knowledge, experience, insight and wisdom to the process, and to keep us aligned with our purpose, values, and needs of the community. With regular sessions throughout the process, the Guide Group supported decision-making and sense-making at various milestones along the way.

The concept of the Guide Group comes from the Winnipeg Boldness Project (Boldness), an Indigenous social innovation lab in Winnipeg, Manitoba. The Guide Group in Boldness' context is a way to remain connected to community to ensure actions that are taken are meeting the needs that are expressed by the communities themselves. For further information about Boldness' Guide Groups, please visit winnipegboldness.ca.



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Principles + Values

PRINCIPLES ARE RULES THAT GUIDE ACTION

- We will do **'WITH', NOT FOR**
- We will sit in **COMPLEXITY** and **NOT JUMP TO SOLUTIONS**
- We will **CHECK OUR EGOS** in this space
- We will be **NURTURING GUIDES**
- We will **NOT PARTAKE** in **TOKENISM**
- We will **TRUST OTHERS** and **THE PROCESS**
- We **GIVE IDEAS RUNWAY** to expand
- We will provide **DIFFERENT WAYS TO PARTICIPATE**
- We will **CREATE A BRAVE SPACE** where imperfect **EXPERIMENTATION CAN HAPPEN**
- We will keep a **HIGH LEVEL OF TRANSPARENCY**
- We will **LOOK OUT** and **CONNECT IN**
- We have the **RIGHT TO PASS**
- We will **GET MESSY** and **HAVE FUN!**

VALUES ARE QUALITIES AND STANDARDS THAT GUIDE OUR BEHAVIOUR



CURIOSITY



COURAGE



HUMILITY



OPENNESS



BEGINNERS MINDSET



RESPECT



KINDNESS



EMPATHY



ADAPTABLE LEADERSHIP

PHASE 1: SYSTEMS + STORYTELLING

What is System Mapping?

There are many approaches and methods for system mapping. Ultimately, system mapping is a process of visualizing a system in order to deepen our understanding of it. The Systems Innovation Network describes system mapping as a type of modeling that is designed to reveal the underlying interrelationships and structure of a complex system. System maps are powerful visualization tools that can help describe and diagnose the current state of a given system; understand how system structure creates observable outcomes and patterns; create a shared vision of a system; gain consensus about the issues or challenges within the system and identify leverage points and opportunities for change or intervention.

Our Process and Approach

The first year of the lab focused on system and story mapping - a process that included workshops, interviews, extensive document reviews and data visualization, resulting in a challenge map that identified key issues and challenges within Calgary's nonprofit sector. Our approach was to centre the lived experiences and stories of people within the sector and those impacted by the challenges. The map was vetted and validated through a community insights process which led to the identification of high potential areas for change.

The Challenge Map

The map on the following page is a visualization of the themes that emerged through the interviews, workshops and document review process. We approached the creation of the map using an adapted version of the Impact Gaps Canvas framework developed by Daniela Papi Thornton (systems-ledleadership.com) in order to understand the challenge and solutions landscape relative to our overall question.

It is important to remember that complex systems are dynamic, non-linear and constantly changing and, as such, a system map is never complete. However, the stories and experiences shared with us through the interview process and workshops, along with in-depth document reviews from local, provincial, national and international sources, give us a deeper understanding of the challenges, dynamics and patterns within the system.



Challenge Landscape

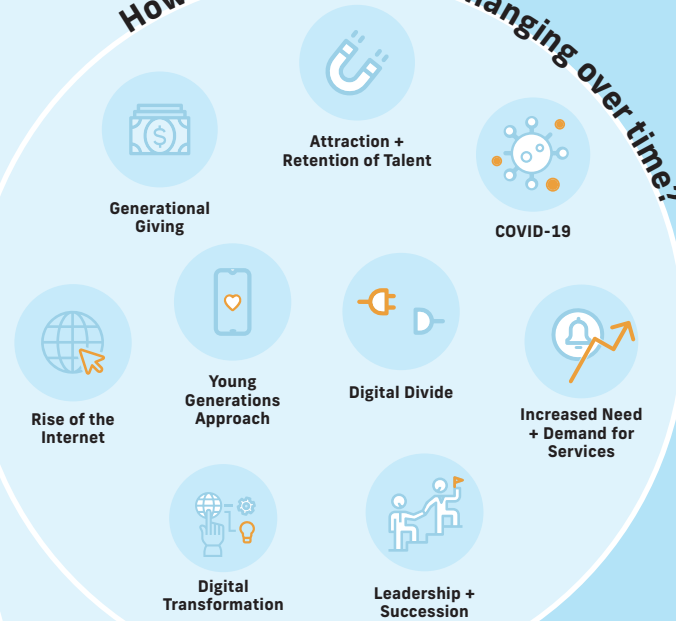
The Challenge Map

Solutions Landscape

What is the challenge?



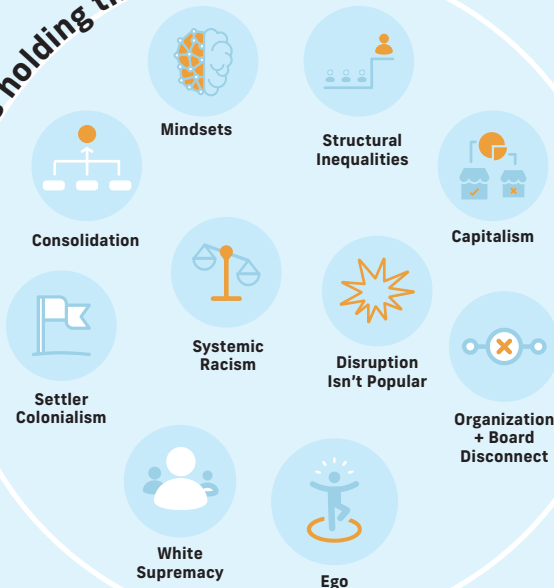
How is the challenge changing over time?



What solutions have been/are being tried?



What is holding the challenge in place?



What solutions have been/are being tried?



Identifying Areas Of High Potential

Using the map, the Lab team examined the patterns, relationships and connections to identify points where intervention or change could potentially have transformative impact. With the Guide Group, we looked at key areas of the map and asked the following questions:

- Does this area align with the overall purpose of the lab?
- Is there already work being done in this area in a substantive way?
- Will work in this area add value (rather than create fatigue, particularly for equity-seeking groups?)
- Will work in this area increase people's power and dignity (using an equity lens)?
- Is this the right time (taking into consideration what else is happening in this area)?
- Can there be meaningful progress in a ~2 year timeframe?
- What resources are available to support this area?
- Does this area have potential to positively influence other areas of the system?

Through dialogue and deep discussion the Guide Group identified **Data + Storytelling** as a high potential area for change and this became the focus of the second phase of the lab - Co-Design.

PHASE 2: CO-DESIGN TRANSFORMING DATA + STORY IN THE NONPROFIT SECTOR

The Challenge + Context

We live in a world of data. Never before have we had access to so much information in so many forms.

In the nonprofit sector, we tend to collect data primarily to report to funders - to account for how funds were spent and the impact that resulted. The act of gathering data is costly and time consuming, yet many funders remain reluctant to invest in gathering the data they require of organizations. Further, the data that funders collect remains unused, while the potential for shared insight and greater impact is lost. Lack of coordinated data sets means that many organizations are working in similar spaces on similar issues without ever sharing information or insights. Given the emphasis on demonstrating successful outcomes, we are unlikely to highlight the rich information that lies within our failures - our learnings.

Next, data remains synonymous with linear, western models that prioritize numbers, inputs/outputs, and results based frameworks. In doing so, we lose the stories that bring meaning and nuance to these numbers and offer deeper insight into what actually makes a difference. We have work to do to decolonize our approach to data - valuing and honouring the diverse knowledge systems and story sharing methodologies within our communities. We need to ensure that our methods of collecting and analyzing information do not perpetuate inequalities, deepen power imbalances and reinforce colonizing practices within the sector.

Finally, data and stories help us advocate for change. The nonprofit sector is vastly under-resourced when it comes to gathering and transforming data and stories into meaningful, systems-level change.

The Guiding Question For Co-Design

WE
People who are challenged by and see the potential to use both stories and data to create meaningful change.

VALUE, GATHER, MAKE SENSE OF + HONOUR/ACTIVATE/SHARE
Honouring diverse knowledge systems, decolonizing practices and methodologies, pattern finding, meaning-making, and informed-action.

How might **WE** transform how we **VALUE, GATHER, MAKE SENSE OF + HONOUR/ACTIVATE/SHARE STORY + DATA** to collectively **LEARN, ADVOCATE AND CREATE MEANINGFUL CHANGE** in our **COMMUNITIES?**

STORY + DATA
Appreciating both qualitative and quantitative information, honouring lived experience and storytelling.

LEARN, ADVOCATE AND CREATE MEANINGFUL CHANGE
Convene and collaborate with the purpose of using data and stories to inform and design strategies that can be shared with people who have power to influence and make meaningful change.

What is Co-Design?

Simply put, co-design is an approach to designing with, not for, people. It brings together people with lived experience, communities and professionals to co-design and co-create solutions to address a challenge they all care about. It uses creative, participatory methods to elevate the voices and contributions of people with lived experience.

Co-design is a different way of working. Co-design is very hands-on and action-oriented and the learning is through doing. Solutions are co-designed with the people who are most affected by the challenge and we test our ideas in the 'real world' through prototypes and

experiments. The learning that happens through this process helps improve the next version of the solutions and also builds understanding of what works and what doesn't. This learning is captured and shared with others who are also working for meaning change.

PRINCIPLES OF CO-DESIGN INCLUDE:

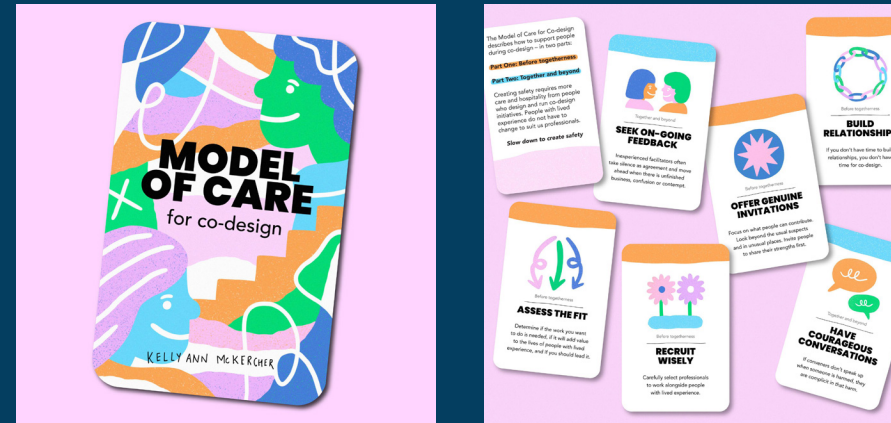
- *Shared power*
- *Prioritize relationships*
- *Use participatory methods*
- *Build capacity*

A Model of Care for Co-Design

In the co-design phase of the lab, we drew on K. A. McKercher's Model of Care for Co-Design, which creates a framework for how to support people in the co-design process. Divided into "Before Togetherness" and "Together and Beyond", the Model of Care outlines practices to care for both the support team as well as co-design participants.

COMMUNITY CARE

With a model of care in mind as we entered the co-design phase of the lab, we created a role within the Lab Team to tend to the wellbeing of participants. The Community Care Lead facilitated practices to build relationship, connect with our physical bodies, deal with emotions and discomfort as it arose and practice presence with each other and the process.



To learn more about K. A. McKercher and the Model of Care, visit www.beyondstickynotes.com

The Co-Design Team

The Data + Story Co-Design Team (the Co-Design Team) was made up of 12 outstanding individuals from a range of sectors and backgrounds. Given evolving professional and personal circumstances over the duration of the lab, the Co-Design team shifted to include 10 individuals who brought a diversity of perspectives, experiences and voices to the topic of data and storytelling in the nonprofit sector.



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KEN LIMA-COELHO
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DOMINIC SHAW
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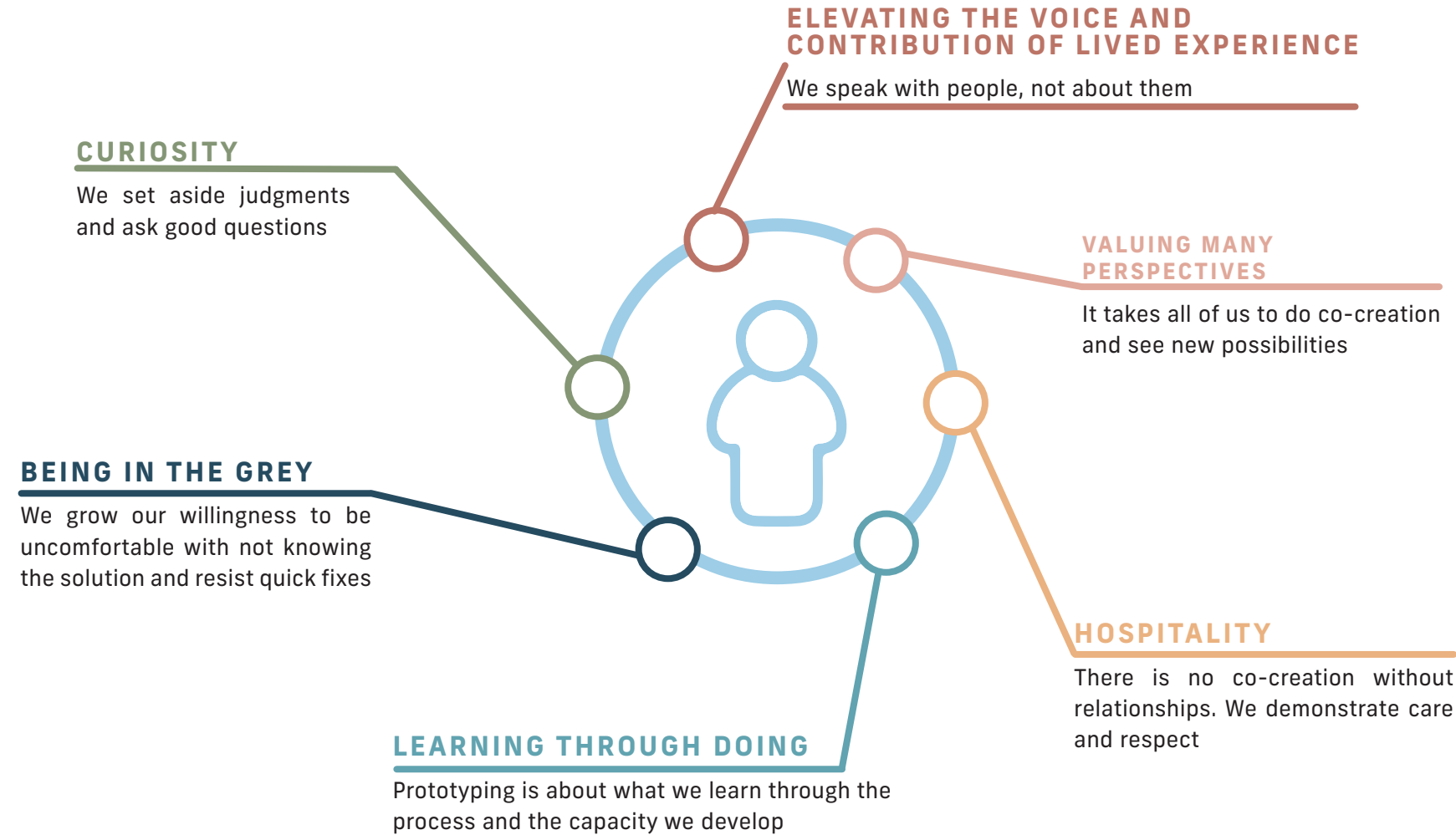
GEOFF ZAKAIB
Data for Good: Civic Tech YYC

As we moved into the Co-Design phase, we used several key frameworks to ground us in both our process and understanding the complex systems.

Mindsets for Co-Design

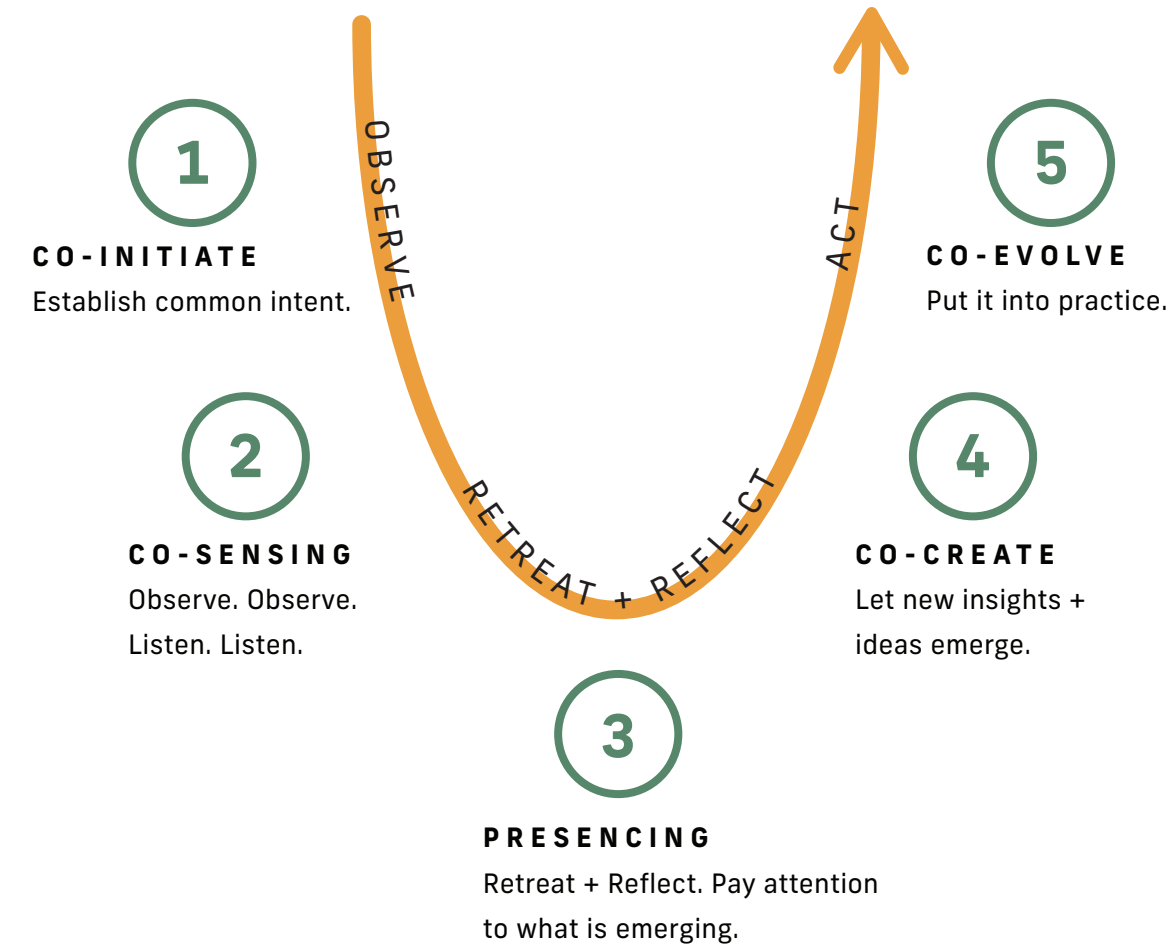
A mindset is a way of being and thinking rather than a tool or method.

Adapted from: *Beyond Sticky Notes* by KA McKercher



Theory U

Theory U, developed by Otto Scharmer and the Presencing Institute (presencinginstitute.org), is a framework for supporting innovation in complex systems. It is a tool for working in complexity and leads us through a process of observation, retreat, reflection and action. It calls us into presence with complexity.



For many of us, there is a strong urge to jump from establishing an intention to taking action. When working in complexity, it is important to sense into the ecosystem; to observe and listen deeply and then to become present and pay attention to what is emerging. We can then share deeper insights, allow “aha’s” to emerge, co-create new ideas, prototype and test, and then put them into practice. Theory U invites us to practice *patient urgency* — recognizing the urgency to address our pressing challenges and the patience required to deeply understand the challenge so that we can act in a way that has the highest potential.

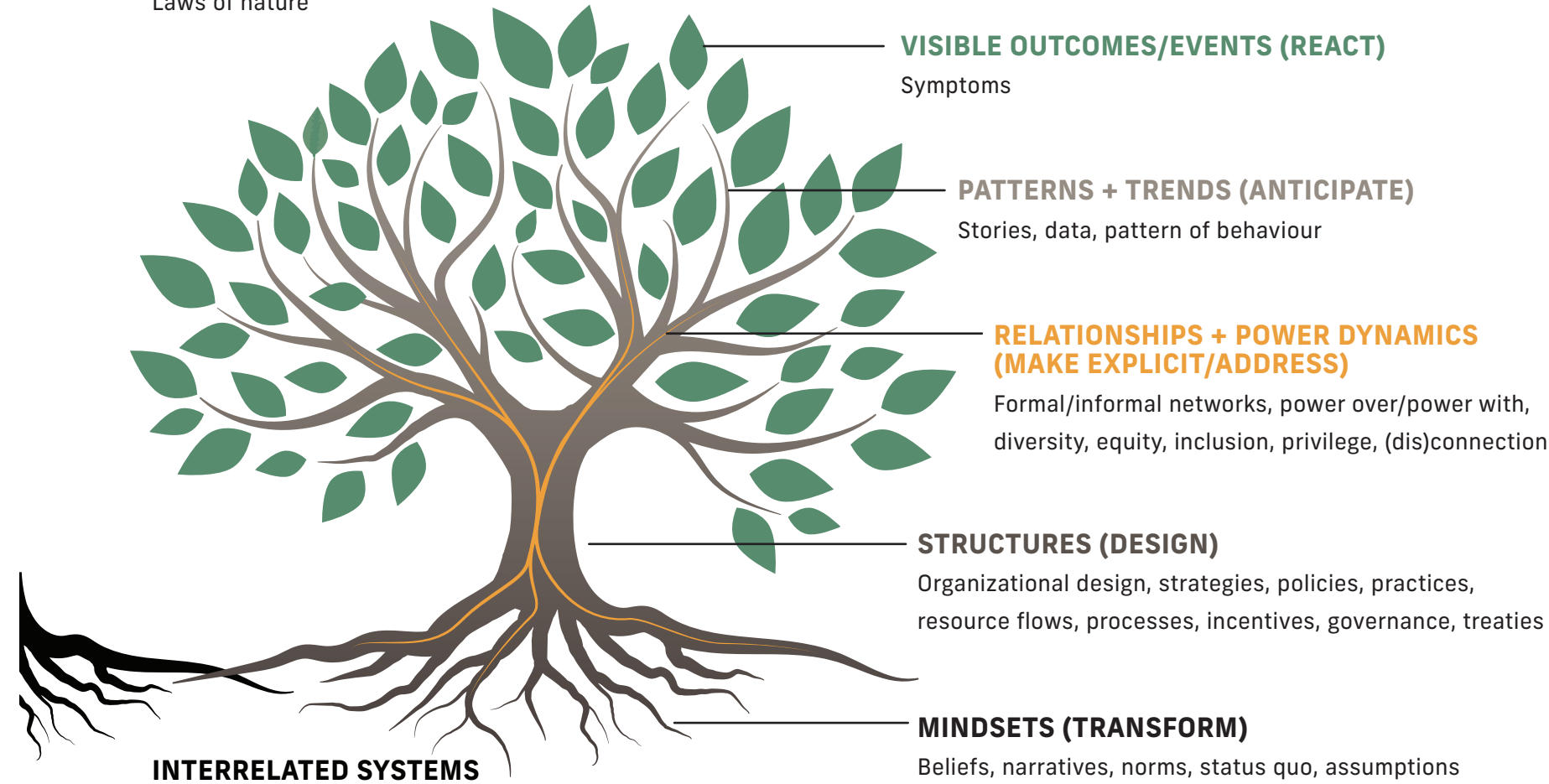
“Presence: Defines the capabilities that underlie our ability to see, sense, and realize new possibilities in ourselves, our institutions, organizations and society.”

Senge et al, 2008

Systems Change Tree

NATURAL ECOSYSTEM (MOTHER EARTH)

Laws of nature



Adapted by Jill Andres, Carole Muriithi & Elder Robert Greene (2023).
 Designed by Amy Rintoul (2023).
 Clare, E.Y., Page, K., Yu, B. & Preston, A. (2018). Oppression Tree. Centre for Community Organizations.

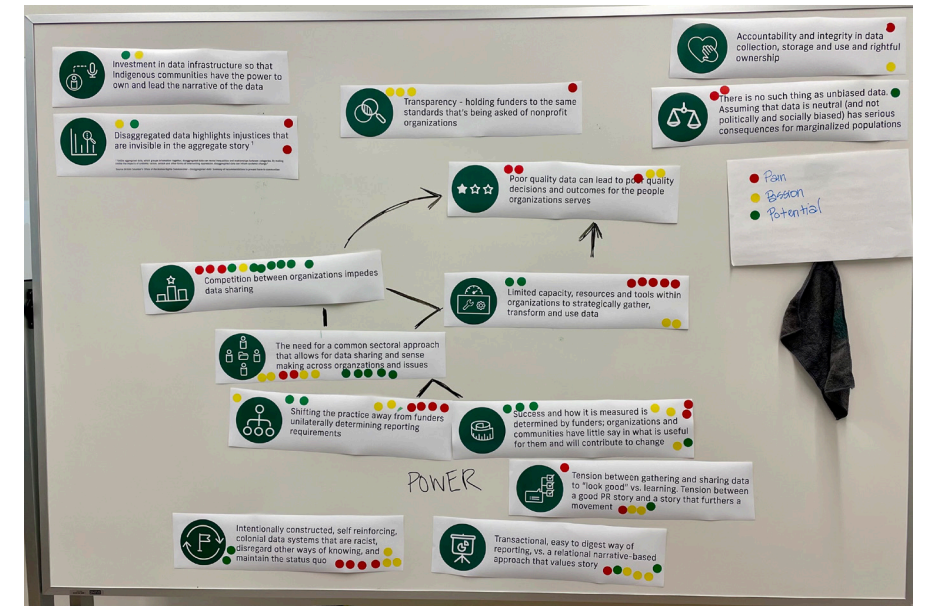
Finance Innovation Lab. (2020). Climate Safe Learning Lab Change Framework.
 Kania, J., Kramer, M. & Senge, P. (2018). The Six Conditions of Systems Change.
 Senge, P. (1990). The Iceberg Model.

Identifying Areas For Prototyping

How do we, as co-designers, decide what areas of the system we will focus on for prototyping and testing new ideas? Where can we intervene in the system to discover potential areas of transformation? The Co-Design team spent numerous workshops over several months looking deeply at the challenges related to story and data in the sector, engaging in dialogue across different perspectives and experiences, and identifying patterns within the system.

Through a facilitated process to identify high potential areas for change, Co-Design members self-organized into groups that aligned with their interests and spheres of influence.

The process of identifying prototype areas and self-organizing into groups was challenging as members wrestled with the what, why and how of addressing challenges and patterns within the system. From this process, 6 prototype groups emerged to design and test new ideas and possible solutions.



IDEAS + PATHWAYS

Ideating and Prototyping

Ideating and prototyping move us into the experimental part of a social lab - where we can generate new ideas, design, test and iterate in order to discover potentially transformative solutions.

In this phase, the Co-Designers spent time in their prototype groups looking at different challenge areas, generating multiple ideas and eventually focusing on one idea to take into design, early prototyping and testing.

What is a Prototype?

Prototyping gets us into the experimental part of a social lab - where we can generate new ideas, design, test and iterate in order to discover potentially transformative solutions.

Prototyping is about making ideas visual and tangible. It's a low cost version of an idea that can be tested, tweaked and made better through feedback... In social labs, prototyping is a key approach to developing, testing and improving on an idea at an early stage before many resources are committed to implementation.

MaRS Living Guide to Social Innovation Labs

A prototype is a tool that gives you a change to investigate your ideas and explore what could, should, or would come next... Prototyping helps lower the stakes for exploring new questions by reducing risk - using fewer resources like time, money, and emotional commitment - especially when anxiety about outcomes might keep you from starting.

Stanford d.school

Early Prototypes

Within the timeframe of the lab, the Co-Design groups were able to design and test early prototypes for their ideas. It is important to note that the prototyping phase can go through many iterations and take prototypes all the way to implementation and scaling in some cases. Within the context of the Nonprofit Resilience Lab, the Co-Design phase was designed intentionally to spend time in dialogue across different boundaries and perspectives to begin to more deeply understand the challenges, mindsets and root causes related to story and data in the sector. Early prototypes were then designed and tested to generate learnings and identify areas of potential.

There is much debate in the social lab community about whether or not a lab should take prototypes all the way to implementation and scale. In the Nonprofit Resilience Lab, we concluded with early prototypes to capture learnings, and potential pathways for the sector.



Prototype Ecosystem

While each of the prototypes can be considered on its own and there is certainly value in doing so, it is perhaps even more valuable to consider the prototypes as part of an ecosystem of interconnected approaches to addressing the guiding co-design question. As is so often said in the context of complex challenges, no one individual, organization or even sector can solve them alone. This applies not just when considering who and how to convene, but also when considering the intersecting nature of what emerges.



For example, three of the prototypes bring forward differing, yet complementary, approaches to addressing the power that funders hold when it comes to what, how, why and from whom stories and data are gathered and, subsequently, how opportunities are created to learn from what is gathered and to apply this learning to create meaningful change. Another combination of prototypes offers insights into the importance of creating brave, well-supported, intentionally designed and skillfully facilitated processes and spaces when convening people to share their experiences - whether in a community, organizational or inter-organizational context.

We invite you to consider how other approaches you have come across - or are involved in generating - may further connect to the prototypes in this ecosystem.



The Prototypes

Reimagining Community Data Sharing for Sensemaking

Team: Geoff Zakaib, James Stauch, Jenalyn Ormita

THE CHALLENGE

Although we do measure some of the things that matter in our community, it is barely visible and not accessible. We have disparate, disconnected and low profile means of measuring community prosperity in Calgary, which means that citizens and civil society have a low level of awareness of how we are really doing as a City. We are at risk of deluding ourselves into thinking that we are doing better (or worse) than we really are.

THE HYPOTHESIS/IDEA

How might we enhance the visibility, connectedness, coherence, usability and impact of community prosperity measurement in a way that engenders awareness, dialogue, and helps fuel new ideas and action?

THE POTENTIAL

- The retirement of Vital Signs as a trusted brand provides an opportunity to rethink and redesign something that could be more universally useful with higher impact
- What potential does advancement in AI provide?
- Community Data Hub - a foundational resource of consolidated and discoverable community data

THE PROCESS

Surface promising practices from other cities and review efforts to measure community prosperity

Interview a small number of practitioners (9) with a city-wide mandate / focus and an interest in community prosperity / wellbeing

Develop a super lean (design-based only) prototype of the most desirable way forward, based on the interviews

Socialize prototype with community organizations that could support implementation

THE LEARNINGS

- Digital Dashboard - is a desired format, but with the integration of storytelling to add depth and meaning to numerical data
- Holistic Presentation - combining both lived experience and stories from our community (qualitative representations)
- Multiple Community Contributors - in order to generate shared understanding and narratives about Calgary that incorporate story from multiple community organizations and sources
- Trust - the dashboard needs to live within a trusted, long-standing community organization (like Calgary Foundation, for example) in order to be a trusted source of information

The Prototypes

From Written Reports to In-Person Gatherings

Team: Greg Burbidge, Jacqueline Harris



THE HYPOTHESIS/IDEA

If we replace written final reports with in-person convening between grantees and funders, this will allow funder to learn more from the grantees, thus providing a more nuanced understanding of their experience, and will also allow individual grantees to learn from each other.



THE CHALLENGE

Reporting to funders is one-directional and does not allow for deeper learning or relationship building.



THE LEARNINGS

Concept vs. Experience

- Testing the idea with multiple groups is important
- Early feedback about the concept was very different from people's experience of the session itself

Value of Relationship Building

- The experience of gathering in and of itself was valuable (regardless of compensation)

Mindset Shift

- Formalized written reports are seen as a justification for investment, rather than an opportunity for learning

Implications for Funders

- The type of information shared by artists/grantees in the room was qualitatively different than what would have been in a written report



THE POTENTIAL

Mindset

- Could reporting be seen as more of a celebration?
- Human-centred approach to granting

Relationship and Power

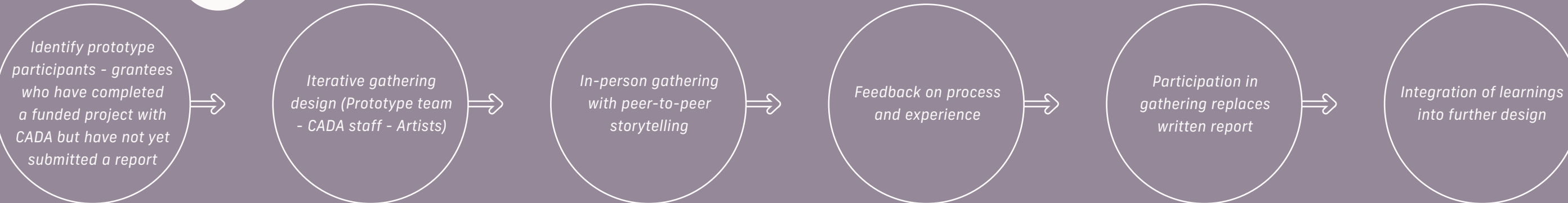
- An approach to collective learning and relationship building, rather than just accountability

Structural

- What does this require of the funder? More time and/or effort
- Include artists who weren't successful
- Could artists showcase their art?
- Scale would mean frequency, not increased size of the group
- Open office once a month – people could sign up and it could be recorded
- Will change how 'Arts Moment' are shared with the board



THE PROCESS



THE PATHWAY

In-person gatherings are being taken forward within CADA a component of the reporting/evaluation process.

The Prototypes

Data Party!

Team: Roman Katsnelson, Ken Lima-Coehlo, Geoff Zakaib



THE HYPOTHESIS/IDEA

If a major funder convened and facilitated a Data Party event with its funded agencies, this could:

- Leverage existing data for a cross-boundary, co-creative conversation;
- Disrupt existing effort imbalance, in which the funded agency does all the work of data-generation and sharing;
- Provide a collaborative context for organizations to use their information for collective visioning and strategic development



THE CHALLENGE

Given the context of...

- Lack of trust among organizations and between organization/funders
- Entrenchment of structures and habits (information only flows one-way)
- Funder accountability as power holder

How might we mitigate fears and emphasize benefits of cross-organizational data sharing and sense-making?



THE LEARNINGS

Connection, Courage, Authenticity, Trust

- Focused on lack of trust and entrenchment, but there was power in connection

Transformational Potential of Collective, Mutual Learning

- Power of storytelling as connectivity
- Level of vulnerability required from funder

Facilitation

- Excellent facilitator

Data and Story

- Data drove the story – when people come together, it's about story (story won the day)

Mindset Shift

- Shocking to organizations that Calgary Foundation would accept this in lieu of a written report



THE POTENTIAL

Structural

- Multiple organizations – real-time cross-pollination

Relationship and Power

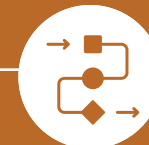
- Shaping a collective identity
- Disruption of power dynamic

Connection to Other Initiatives

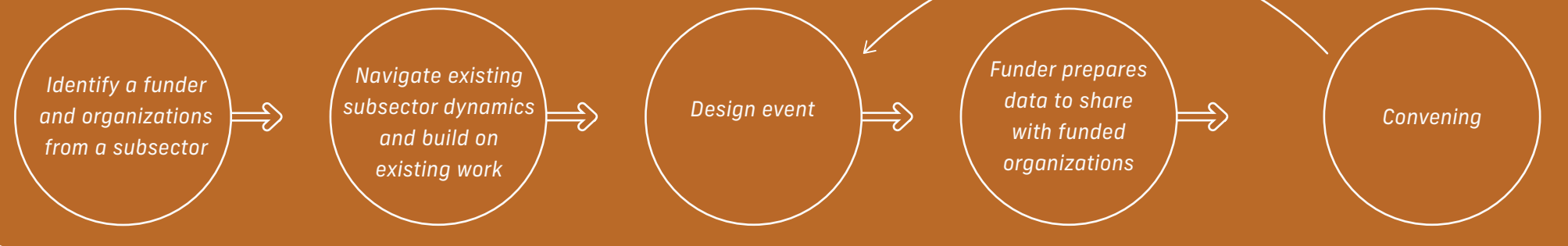
- Leverage community data-sharing initiatives (e.g. Community Data Hub, Measuring What Matters)

Mindset

- Shaping new patterns, habits and ways of being or absolutely nothing changes!



THE PROCESS



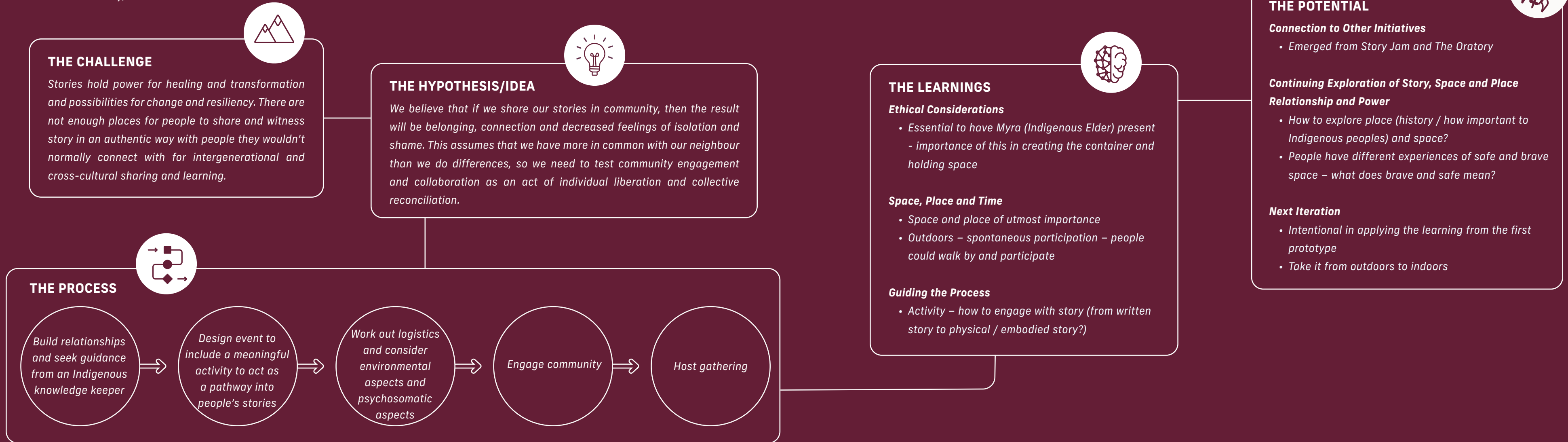
THE PATHWAY

Calgary Foundation's work in supporting the food sector is integrating the learnings and outcomes of the Data Party to inform its planning and strategic action in the coming year.

The Prototypes

Reconnecting Through Story

Team: Priscilla Cherry, Jacie Alook



The Prototypes

End User Direct Engagement

Team: Dominic Shaw, Jamilah Edwards

THE CHALLENGE

End users are often left out of the funder to organization granting and reporting relationship. Can we empower end users and reimagine the grant evaluation process by changing the how and with whom data and stories are shared?



THE HYPOTHESIS/IDEA

Rather than relying on written reporting from the funded organization, this prototype provides an opportunity for end users/program participants to engage directly with the funder to share their own experiences. We want to understand whether a grant evaluation process that directly engages participants from the funded program will support the following:

- All parties better understand what is working about the programs and services and what could be improved
- Program participants will feel more empowered to shape future decision-making
- Program participants will feel that they are contributing to improving conditions for others facing a similar challenge
- The funder will have a more fulsome understanding of mental health needs in community



THE PATHWAY

Lionheart is now exploring what peer supports might look like within their program areas as well as opportunities to elevate parent voice within the overall program. The idea of end-user engagement is being tested within the disability advocacy community.



THE PROCESS

Identify a funder (Calgary Foundation) and Funded Organization (Lionheart)

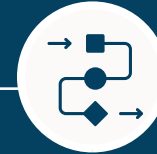
Select 8-12 participants (past and present) from this organization

Iteratively design workshop

Host workshop in a comfortable, accessible setting with a therapist present

Provide food and honoraria

Offer free follow-up therapy as needed



THE POTENTIAL

Structural

- How might end users, organizations and funders all be part of the cycle of grant application, reporting and evaluation?

Relationship and Power

- If people are sharing their personal stories and experiences, we need to ask: to what end?

Mindset

- How can we move beyond programmatic thinking (evaluation of programmatic effectiveness) to more systemic thinking (how can we better understand the overall situation in the community)?



THE LEARNINGS

Participants Want and Need to Share Their Stories

- Provided a much-needed opportunity for parents, in particular, to share the stories of their experiences trying to access mental health support for their children – it was an emotional and cathartic experience

Organization's Role

- The prototype revealed a deep need for peer support within the program participant community (parents and children)

Funders

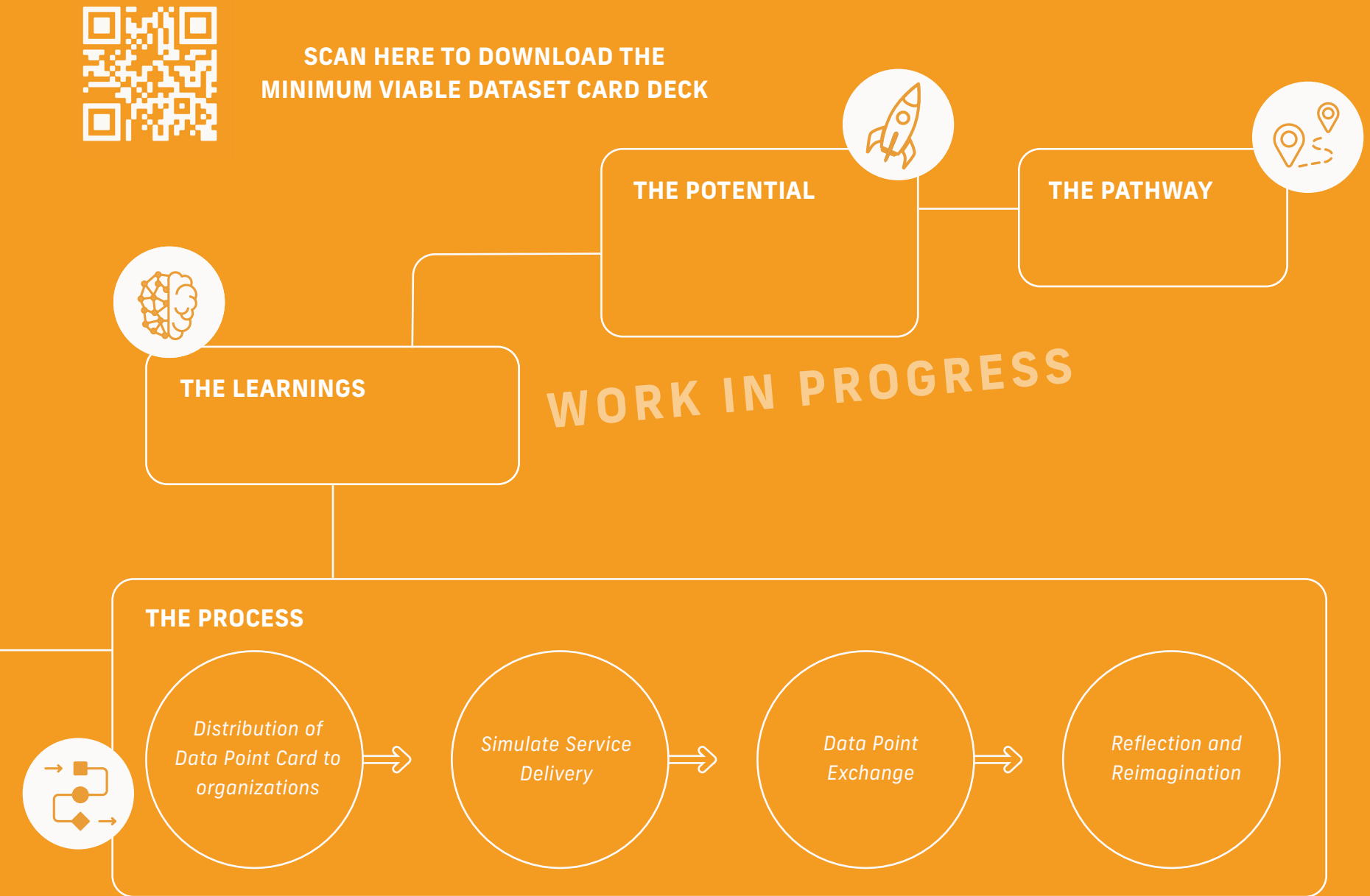
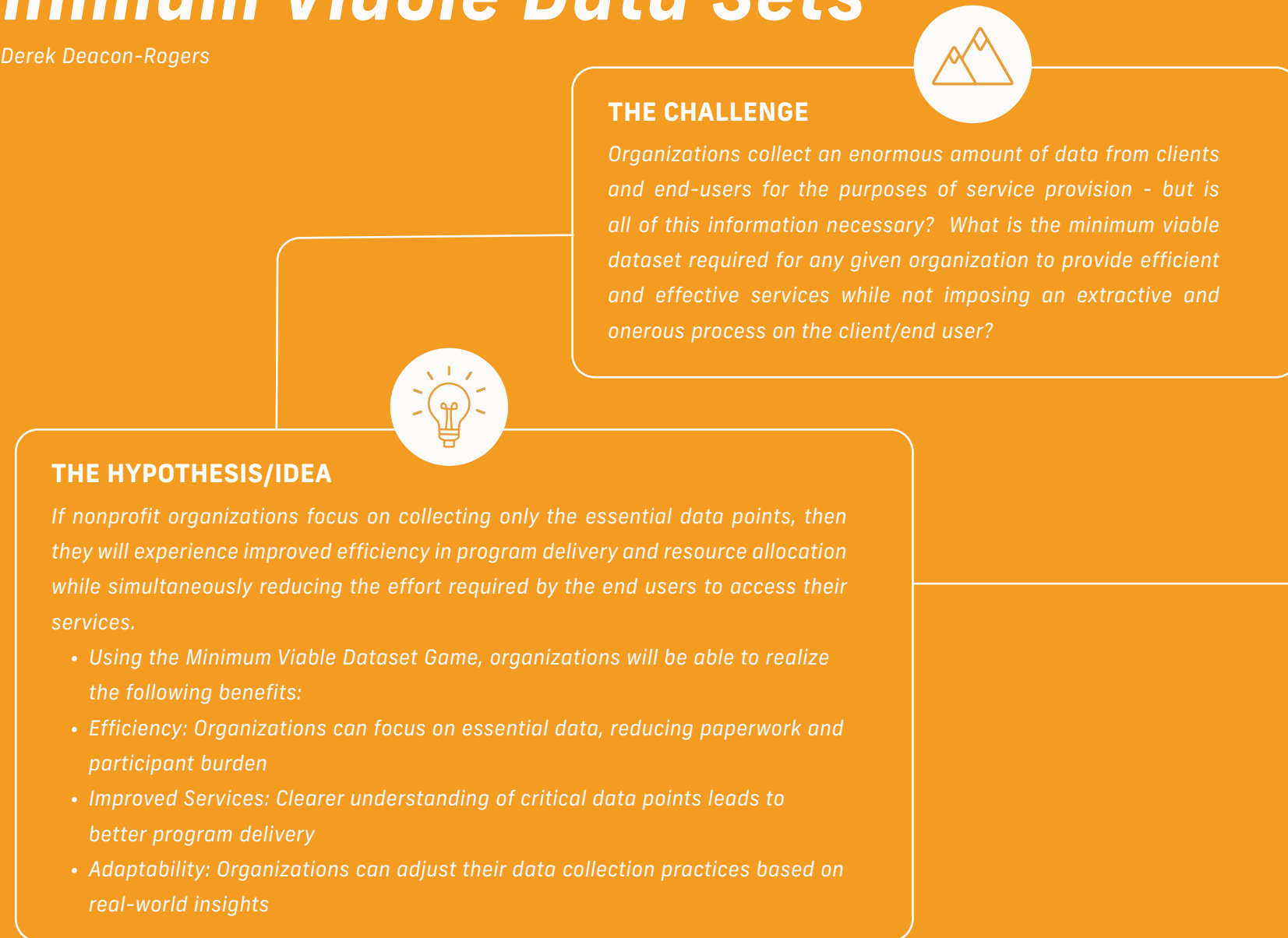
- End users had a lot to say about how to make it better, but the funder is not able to act on this as they don't design programs



The Prototypes

Minimum Viable Data Sets

Team: Derek Deacon-Rogers



SCAN HERE TO DOWNLOAD THE
MINIMUM VIABLE DATASET CARD DECK

LEARNINGS, TENSIONS, QUESTIONS



Social labs are all about deep learning. The complex problems that social labs seek to address do not have simple answers nor are the pathways straightforward. Throughout the lab journey we are constantly trying new things, failing, learning, changing approaches and moving forward. We learn as much about the process as we do about the issue at the centre of the lab. Throughout we are unearthing tensions and surfacing new questions.

WHAT DID WE LEARN ABOUT STORY + DATA IN THE NONPROFIT SECTOR?

Story Creates Meaning, (Some) Data Is Necessary

"I was concerned that data might win over story. Actually, it didn't. Although we came about the prototypes in entirely different ways, with a different purpose, we came to the same place. Storytelling is essential. Data AND story. You need them both."

Co-Design Team Member

Data tends to be revered, but stories are what give us meaning. At the beginning of the co-design phase, the team wrestled with the differences between story and data and the relationship between the two. As we moved through the co-design phase into designing and testing prototypes, it became clear that the challenge is not the value of qualitative vs. quantitative data, but that the two are intimately intertwined. All prototypes, whether or not they set out to look at data specifically or storytelling, ended up relying on story as a mechanism for meaning and sense-making. Data often served as an entry point, but story is what made connections, deepened understanding and allowed shifts in thinking to happen. As one of the co-designers shared: "Stories have the potential to cross boundaries and also re-shape and dissolve boundaries. This is essential to systems change."

Furthermore, some of the biggest questions that surfaced were not in the 'what' of story and data, but in the 'why' and the 'how'. Collecting more data or gathering more stories is not necessarily better and in fact, can be extractive and harmful.

"Stories have the potential to cross boundaries and also re-shape boundaries. This is essential for systems change."

Co-Design Team Member

"The prototype has really transformed our work. It's had us question how we are telling stories."

Co-Design Team Member

"The prototype reinforced many assumptions that our organization has held and 'blew the door off' our expectations of the prototype in other ways. The prototype has shifted how our organization gathers data."

Co-Design Team Member

Honouring Vs. Extracting

"We can't just say, tell us your stories, that's extractive. Gathering data for the sake of gathering data is extractive as well. It's dialogical, where people are both telling and hearing.....really listening to seek understanding. There's a telling of the story and a hearing of the stories, it goes both ways. Indigenous ways of knowing tell us this."

Co-Design Team Discussion

Data and story are most often gathered in the nonprofit sector in order to report to funders, justify use of funds, and to tell a story that positions an organization to attract more resources in order to provide services and programs to communities. As such, the processes of gathering this information can be extractive and those who provide the information often have very little say or control over where it goes or how it is used. The 'why', the 'how', and the 'who' of gathering and using stories and data is of critical consideration.

How can we create spaces, places and processes where stories are honoured and held and where individuals sharing these stories are supported and valued?

"There's a need for stories to be held."

Co-Design Team Member

The Minimum Viable Data Sets Card Game set out to reveal how much data is actually needed for an organization to provide services to its clients or end-users. There is a disconnect between how much data organizations think they need from end-users and how much is actually needed to provide services.

How might we give end-users a role in determining what data is necessary and how it is used?

Disrupting Power Dynamics Is Key To Change

Power, especially the power held by funders, dictates to a great extent what data and/or story is valued, how it is gathered, shared, and whether or not it is used in an effort to create broader change. This is, in part, due to the fact that data and story are primarily used to seek and secure funding. Early on in the co-design process, 'funder power' was identified as a key challenge within the sector and many of the prototypes set out to disrupt this dynamic. Because of the entrenched nature of this power-dynamic, each prototype group had to intentionally design and re-design to shift and disrupt power. There was a constant and ongoing questioning of whether or not funders should be present in the room, how to account for and mitigate real/perceived power imbalances, and whether or not authentic sharing would be possible.

In the prototypes, we saw real possibility for the disruption of power dynamics in the sector when there was a funder willing to put themselves in a place of vulnerability, experimentation, learning and an openness to having their practices challenged. This is possible only where there is an organizational culture within an individual funding organization that is open and supportive. This may not be the case with all funders. However, prototypes such as the ones in this lab show what is possible, point to new pathways and create a space for possibility within the sector.

"Power dynamics between funders and fundees was shifted across all of the prototypes."

Co-Design Team Discussion

"We've shown that things are possible. There is a path now where there wasn't before."

Co-Design Team Discussion

More Accountability Is Needed

Alongside the issue of power within the sector is the challenge of data hoarding, ownership and control. There is a need for greater accountability of those who hold information and a responsibility to do something with it. The Data Party prototype, for example, created a scenario in which a funder was responsible for sharing consolidated data back to the sector in a meaningful way and engaging organizations in sensemaking to inform future directions.

"I have more confidence / urgency / drive to ask funders about what they are doing with the data they collect. To push / provoke conversation. Through the prototypes, we've demonstrated another way. We have a proof of concept."

Co-Design Team Member

"There's a question here that needs further consideration. If we have access to all the data that we need and we still do nothing, what does that say about what we value?"

Guide Group Member

"The lab has changed the way we approach collecting and sharing data in our organization."

Co-Design Team Member

We Need Spaces For Collective Learning

Through several of the prototypes, we learned that people are hungry and eager for spaces of collective learning, meaningful dialogue and for sharing information.

How might we shift the focus from transactional to relational work in the sector and create more spaces and opportunities for collective learning, advocacy and action?

"As an ED, I have gathered lots of data and written countless reports. Not once have I been asked to sit with other organizations addressing similar issues to discuss what we are learning and how we can move the needle."

Guide Group Member

In our mapping process at the beginning of the lab, competition amongst organizations was identified as a key challenge within the sector. However, what we heard through some of the prototypes was that this is really a result of the sector being so siloed. We have a system that breeds competition, not collaboration by funding individual organizations for singular/isolated projects and programs through limited access to funds. There are few to no opportunities for collective learning, data and story sharing. The system is currently structured in a way that centres the organization, not the issue.

"The sector is so siloed, there is no mechanism or infrastructure to share data."

Co-Design Team Member

"I finally feel heard."

Data Party Workshop Participant

WHAT DID WE LEARN ABOUT THE CO-DESIGN PROCESS?

Relationships + Care

Co-design participants valued the relational aspect of the lab. They were invited to cultivate relationships, bring authenticity to their participation and engage beyond their professional roles. In doing so, the lab provided a much needed pause for those working within the nonprofit sector to come together in unique ways, beyond the day to day responsibilities of their individual roles. In its own way, this cultivated resilience for individuals working within the sector.

We spent a lot of time building relationships and working to ensure people felt cared for and supported during the early months of the lab, in particular. This was due, at least in part, to the world we were living in when the Co-Design Team began its work together. We were emerging from the pandemic — a time of collective despair that had an outsized impact on some groups more than others – and people were just beginning to gather with one another again.

While this relational approach is paramount, it must not become the sole focus of the lab. The Co-design Team was convened to address a challenge that each participant had insight into. As we have experienced in other labs, it is possible to build and continue to strengthen relationships as people engage in the co-design of solutions. In this lab, ensuring we had a strong model of care — while important – may have de-emphasized the focus on the challenge itself. However, both are essential.

“Heading into the process we were participants, now we are community. We were funders, and organizational representatives, and end users, now we are the social sector.”

From Co-Design Discussion

“There’s tremendous value for the sector to have individuals working together at this higher level beyond their individual organization.”

Co-Design Team Member

“We were able to have frank conversations because we took time to develop relationships at the beginning of the process.”

Co-Design Team Member

“I looked forward to building relationships with people that were using data in different ways to build my own capacity.”

Co-Design Team Member

The Time Commitment Is Both A Gift And A Challenge

The reality of work in the nonprofit sector is that there is never enough time or resources. The lab set out to create a space and process that allowed participants to take time out of their busy schedules to reflect, engage, question, dive deep, explore and create new possibilities. Building relationships, moving beyond our default patterns of thinking, and uncovering root causes takes time and intentionality. On the one hand, this time and space was seen as a gift, a necessity and was appreciated.

“The lab afforded our organization the time, dedication and accountability to test and experiment that I wouldn’t have otherwise had the capacity or dedicated time to pursue.”

Co-Design Team Member

“Sticking with the process. When dealing with systemic issues, you have to look hard for root causes and keep asking questions to reveal the core fundamental issues.”

Co-Design Team Member

“Being forced to stick with a different way of thinking until completion of the lab is something I wouldn’t have had capacity in the sector.”

Co-Design Team Member

On the other hand, the time commitment was significant and in some cases, burdensome.

“The time commitment of the lab was significant. Beyond the gatherings themselves, the time and capacity required to develop and test the prototypes was significant.”

Co-Design Team Member

“Developing and implementing a prototype was a lot for our small organization.”

Co-Design Team Member

With these learnings in mind,

How might we create a lab process that provides the time and space needed to build authentic relationships, challenge and break through entrenched mindsets, and create space for creative problem solving, while not burdening an otherwise already overstretched sector?

It Felt Too Fast... And Too Slow

The Nonprofit Resilience Lab took place over three years. During this time we had periods of intense work and also time when we slowed way down and even paused. With over 100 people engaged in the process in different capacities over the duration of the lab, the ebb and flow was significant. There were times when the process felt slow (relationship building, challenge and problem framing) and other times when participants felt rushed (prototyping). In some ways three years felt too long, while at the same time just right for the context we were in and the issues that were emerging. In other ways, it felt too short with more time needed to develop the prototypes further, engage in further iterations and/or try more novel approaches. This tension is real, not only for this lab, but for social labs in general.

"Maybe the lab needed another year to realize its full potential. The prototype development and testing felt really rushed. With more time, our organization could have been more intentional about testing the prototypes in different capacities."

Co-Design Team Member

"The lab either needed to be really short or really long."

Co-Design Team Member

"The conversations are important AND it takes time. That was the magic. We didn't rush the process."

Co-Design Team Member

Transitions And Technical Support

The field of labs is still very young and we are learning together about the focus, the structure and the nature of participation in these processes. One of the questions that emerged for us through this process related to the stages of the lab and who to engage at what point and for what purpose. For example, we were clear that the Guide Group would offer insights and guidance throughout the process, with greater involvement at the outset as we worked together to define the broad challenge and, subsequently, the more specific area of focus. Although the Guide Group would continue to be an important source of advice and insight, at this point we would transition to the Co-Design Team, who would have experience and insight into this more specific area of focus and could help understand this area from each of their varied perspectives. Together, this latter group would refine the question and co-create approaches to address it. However, there was perhaps another transition required — or more aptly, others whose expertise and support could also be engaged.

Once the Co-Design Team reached this prototyping phase, we had anticipated bringing in more people who could help with this testing — people with specific skill sets and the time needed to engage in the more technical aspects of the prototypes. However, for a number of reasons, this step was not realized in full. This meant that members of the Co-Design Team were generating the ideas, designing the prototypes, testing them, and iterating on them. Although there was some support from the Lab Team, this was a lot for people who still had their other responsibilities in addition to this lab process. It may also have meant that because co-designers knew they would be responsible for designing and testing the prototypes, they — intentionally or otherwise — may have limited the scope and scale of potential solutions. Had we had more technical and logistical support for this phase, this could have taken pressure off the Co-Design Team and may have led to different results.

DEEPER REFLECTIONS ON THE LAB PROCESS

Space For Experimentation To Disrupt Systems is Needed

The lab revealed that space for experimentation is not only valued, it's needed to disrupt or shift patterns within the nonprofit sector. Existing structures related to funding and inherent power dynamics within the sector limit risk taking and experimentation. The prototypes enabled experimentation and proof of concept. Because of the lab, the potential of the prototypes to be applied beyond the lab has become a possibility.

"The lab enables 'lower-risk' testing and experimentation that isn't otherwise possible in the sector."
Guide Group Member

"The structure of the lab allowed for experimentation and risk mitigation that is innately lacking in the social sector. The sector is risk averse, there is little room for experimentation that is otherwise embraced in the private sector."
Guide Group Member

"The lab has legitimized experimentation in the sector. There is now a precedent. This has transformational potential."
Guide Group Member

Shifting Power Dynamics Can Be Messy

As 'funder power' emerged as a significant challenge within the sector, we realized that the Nonprofit Resilience Lab - with Calgary Foundation and the Studio as lead partners - was a prototype and an experiment in and of itself that challenged relationships and power dynamics in a significant way.

In the beginning of the lab, Calgary Foundation staff sat on the Lab Team and participated in meetings, decision-making and workshops. Throughout the process, we questioned whether or not Foundation staff should be in the workshops, not knowing if their presence would influence the depth and direction of conversation amongst participants. As we moved into the Co-Design phase of the lab, we decided not to have Foundation staff in the workshops for this reason. However, several prototype groups engaged Calgary Foundation staff from other departments in designing and testing their prototypes as a funder was needed who was willing to engage in experimentation. Calgary

Foundation's culture of organizational learning along with staff's familiarity with the lab, made their participation in the prototypes easy.

During the lab process there were times when the role of the Foundation was unclear as they were both Lab funder and prototype participant. On one hand, the willingness of Foundation staff to commit to the lab on multiple levels was incredibly valuable, and it also put them in a place of both vulnerability and influence.

There were many lessons learned in this, namely: a lab funder should not be part of the co-design and prototyping phases of the lab as the power dynamics are real and cannot necessarily be seen or mitigated. At the same time, disrupting typical power structures is essential to spurring change in the sector and we need to test different ways that this might be possible, paying careful attention to overall transparency and open communication.

Running A Lab During A Global Pandemic Was Hard

This lab began during the pandemic – a time of collective trauma and societal reckoning that shone a spotlight on deep inequities and systemic barriers. As discussed above, this led us to place considerable emphasis on relationships and care. An obvious challenge was related to gathering – the heart of lab processes – as the lab began online. The Guide Group met virtually for the first year, and initial conversations

with potential Co-Design Team participants were conducted virtually as opposed to over coffee. When we did begin meeting in person there was a sense of relief, as well as a level of anxiety around being in an indoor space with others. The effects of launching the lab during the pandemic endured in visible and invisible ways throughout.



A 'Lab' Is Only One Option For Convening Around Complexity

Social labs have emerged over the past decade as an approach to addressing complex societal challenges in a way that engages people from different backgrounds and sectors in co-design processes and prototyping. There is a current conversation exploring what niche the lab fills. What is the role of social labs and what are the contexts in which they make sense? Where are other approaches – such as collective impact and networks, for example – more suitable?

As we continue to design and facilitate collaborative processes for addressing complex issues in our community, the Studio team is continuously reflecting on our practice and how we can best serve and support community given our deep experience in process design, facilitation and community engagement. Social labs are one method for doing so, but there are a wide variety of tools, methodologies and collaborative processes for working in complexity. The Nonprofit Resilience Lab has helped us refine our lab practice, however, we remain committed to designing and facilitating collaborative processes that fit both the context, the participants and the desired outcomes.

HOW DO YOU END A LAB?

What does it mean to end a lab when the problems haven't been solved and there is always more that can be done? There is much debate in the field of social labs about when a lab should end and how far a lab should take prototypes through scale and into implementation. The approach to labs at the Studio is very similar to that of our colleagues at the City of Vancouver Solutions Lab (SLab).

"[W]e are quick to jump to solutions without fully understanding the problem. It typically takes a little while for root causes, stuck patterns, and deeply ingrained mental models to surface, and spending more time in that space is where we notice that participants shift their understanding of the challenge and are able to unearth these more systemic aspects of the challenge, particularly when complex challenging are working toward social and ecological justice.... [T]here is also a focus on co-creating and relationship-building... All of these things take time..., we're slowing way down when it comes to systems mapping and problem framing, and picking up the pace when it's time to make some choices about what ideas to explore further and test." (Tending to What We Want to Grow, City of Vancouver SLab)

In the last stages of this lab, questions started to bubble up: What's next? What's going to happen to the prototypes? What about other issues in the sector? What if we didn't actually solve the problem? So often we want things to come to some sort of tidy conclusion. These are all valid questions and ones that we are exploring together. But working in complexity means that there are not tidy conclusions and that the work will continue beyond the time frame and container of the lab. What we set out to do was to create a space and process where we could come together across typical boundaries, ask bold and provocative questions, have courageous conversations, test new ideas and ways of thinking, make mistakes, learn, unlearn, and learn some more, get up and try again. This way of working is unconventional and uncomfortable and rich beyond measure.

Some of the prototypes have clear pathways forward, others have provoked a new way of thinking in the sector, while others may have 'failed' in terms of what they set out to test, they illuminated other areas for change. What we learn, gain and put into practice as a result of the process is, ultimately, the outcome.

"The connections and experience of the lab itself was the value. I wouldn't have had this otherwise. It informed my own practice and the way I look at, understand and use data. I took more away from it than what I contributed."

Guide Group Member

"There is a lot of value in sharing the learnings from the prototypes broadly to then put the onus on the reader to take action in their own practice to propagate these prototypes."

Co-Design Team Member

"I am less fearful about the state of the sector as a result of the lab."

Co-Design Team Member

"The lab was an affirmation of the ethos of our organization. We need to embrace challenges and see them as opportunities. We need to welcome disruption to see the change we're seeking."

Guide Group Member

"Each gathering brought meaningful conversation. It was restorative. Spaces like the lab, to gather, to connect, are rare. It's needed to support resiliency (of people) in the sector."

Guide Group Member

"The amount of space that was made available to be vulnerable and talk about sector-wide issues, but also how these issues affect us personally, had a profound impact. I don't often sit around tables that have this depth of care."

Guide Group Member

"There are few opportunities like these throughout one's career to be in a room with smart people working towards a collective mandate."

Guide Group Member



REFLECTIONS FROM CALGARY FOUNDATION



Calgary Foundation's role in the Nonprofit Resilience Lab was not as a traditional funder. The Lab was part of the Foundation's direct charitable activity supporting the sector beyond grantmaking through capacity building. The Foundation's role was complex, and often a delicate balancing act. We recognized the power dynamic that having a funder present brings to the conversation, so at times we had to step back to create a safe space for the voices and experiences around the table, while other times, we were an active participant.

Calgary Foundation's community knowledge and relationships in community is one of its biggest assets. When we asked people to get involved, while the concept of a social innovation lab was unfamiliar, the trust and relationship that existed made it easier for people to trust the process and make a commitment to get involved. When funders were needed at the prototyping stage, the Grants team at the Foundation were willing participants – even when knowing they would be required to be vulnerable and open to challenging feedback. The potential for direct impact on our own grantmaking processes could be significant in this process.

What should other funders know before embarking on a social innovation lab?

It takes *time*.

We anticipated a two-year timeline, but we've learned that when working in complexity, while the process is clear, sometimes the outputs are unpredictable. You adapt as you go to ensure that the work is done well.

It takes *money*.

A multi-year lab process takes significant financial resources. It is critical to ensure that all the right tools and expert facilitation resources are in place to create a space where people are cared for and great work can happen.

It takes *commitment*.

Calgary Foundation began an organizational shift eight years ago to learn about systems change, and the need to address complex community issues using a systems-thinking approach. This commitment comes at all levels of the organization – board, leadership, and staff. It can be difficult to sit in discomfort or to not be able to plan the outcomes, but the Foundation recognizes the need to change our ways of doing to shift patterns as part of the process when addressing complex community issues.

It takes *strong partnerships*.

Calgary Foundation's partnership with the Trico Changemakers Studio is one of trust, respect, and a shared vision for the community we want to live, work, and play in. We are grateful for the Studio's willingness to join us in our systems-change journey, and to help us develop our systems thinking muscles. We look forward to continuing our work together in the future.

