

**Learning for Greater Impact:**  
***Linking Rural and Urban through Research and***  
***Reflective Social Enterprise Practice***

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**Abstract:** Four stakeholders with diverse experiences in social enterprise describe their experiences and perspectives on sector development and opportunities for collaboration. Beginning with a description of underlying threads of Canadian social discourse that have contributed to the current context, the authors argue for new approaches to defining roles within the social enterprise sector. The roles of practitioner, consultant, and academic are all considered, as are possible areas where the interests, assets and capacities of these groups overlap. Specific collaborative modes are laid out, and the case made for increased connectivity among apparently disparate groups collectively building the field and influencing policy.

**Key Words:** Social Enterprise; Public Policy; Non-profit; Development; Collaboration;

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We are a team of seasoned practitioners and academic researchers, who have been active in social enterprise (SE) development for many years. Our understanding of the social enterprise context is informed by extensive strategic and practical experience. Collectively, we have worked with over 500 social enterprises in both urban and rural settings.

We have worked closely with funders and other investors to develop strategies and investment for social enterprise. Our research and analysis of investment infrastructure for social enterprise development reveals gaps in investment, a misalignment of priorities at different levels of government, and barriers to collaboration across the sector. This paper provides an opportunity to share our learning, while examining opportunities to create a more integrated system for social enterprise development.

## **1.0 Introduction**

There are various forms of social enterprise that utilize business strategies to support the delivery of social goods and services. In this paper we are concerned with both non-profit and co-operative social enterprises.

The paper considers the unique role played by the social enterprise practitioner, consultant and academic researcher. It is written from the perspective of four individual “field builders” who are collaborating to document learning about the sector and enhance practical and strategic opportunities for non-profit organizations that are developing social enterprises in both rural and urban settings.

Based on our experience and research, the authors provide an historical perspective on social enterprise development in Canada and Ontario. Building on each of our unique perspectives, we discuss the characteristics of a successful system of support for social enterprise. We identify a need for effective systems of support for non-profit social enterprises. Multiple stakeholders with different perspectives can build this system through collaborative work to influence strategic and practical investment decisions.

Focusing on our roles as knowledge, skills, and systems brokers, the authors highlight strategic linkages that can be developed for greater impact in communities. We describe our evolving roles in both the development of individual social enterprises and place-based systems of support, and the identification of opportunities for high-impact strategic investment through larger social enterprise sector development.

## 2.0 A Historical Perspective

While the term “social enterprise” is relatively new, the practice is certainly not. Canada has a long history of practice that is fundamental to the contemporary social enterprise movement. Social enterprise evolves out of the history of places, out of the ethos of cultures, out of the beliefs and values of people in their communities. As Scharmer and Kaufer (2013; 57) describe, “The journey differs for each country and civilization.” Thus, the evolution of social enterprises in Canada is a particular journey, specific to our historical context. This section, describing the history of social enterprise in Canada, will inform our understanding of contemporary social enterprise development in the Canadian context.

There are three influential threads of thought that have played a role in developing the particularly Canadian philosophical spirit underlying contemporary social enterprise development and practice. These are the social gospel, the social democracy movement, and the co-operative movement.

The social gospel movement in Canada was a Christian response to the ills of an industrializing and urbanizing nation. It was highly influential socially and politically between 1890 and the 1930s. The movement was premised on the belief that God was at work through social change. Promoting social justice and providing moral order, the movement sought a reinterpretation of church doctrines, emphasising the development of an increasingly collective society. Much of this was in response to the social and industrial context in the 1880s, and what Richard Allen (2013) describes as “a decade of materialism, political corruption, economic distress and a growing sense of urban disorder”. Supporters of this movement went on to found mission houses and institutional churches, including St. Andrews Institute (est. 1890, Toronto), and the Fred Victor Mission (est.

1894). In 1908, the Moral and Social Reform was established to deal with urban issues related to health and children. In 1912, it was reorganized as the Social Service Council of Canada, sponsoring comprehensive surveys of urban conditions. In 1914 the Council held the first national conference on social problems.

While there was an urban focus in much of their work, the movement also addressed rural issues, drawing leaders from the United Farmers of Ontario, the Grain Growers Association, and the United Farmers of Alberta. With the onset of WWI, the social gospel movement grew, influencing social discourse of the day with regards to prohibition, women's suffrage, civil service reform, social research, and the expansion of co-operatives. During the 1920s social gospel's influence decreased as Canadians embraced the new hedonism, perhaps having exhausted the "do good" attitude and moral righteousness that characterized the movement. However, there was again a resurgence of the movement in response to the Depression. Out of this turbulent time arose such prominent Canadian social gospel movement leaders as Tommy Douglas, Eugene Forsey and King Gordon. Following the Second World War, the social gospel movement as such essentially ceased to have a continuing impact on the Canadian political and social landscape. Yet, as Richard Allen (2013) notes, they laid the groundwork for the emerging welfare state that Canada was becoming.

The second thread to be considered in setting the context for social enterprise in Canada is the social democracy movement. The formation of the Social Democratic Party and the Co-operative Commonwealth Federation, founded in 1911 and 1932 respectively, brought together a coalition of progressives, socialists and labour force activists in an attempt to relieve the suffering many experienced during the depression. They proposed the nationalization of key industries and the establishment of the welfare state. The creation of the CCF and its increasing popularity through the 1940s prompted the Liberal party to shift to the left. As a result, it was social democrats and reform

minded liberals who eventually enabled the development of the welfare state. In 1961, the CCF was transformed into the New Democratic Party, with Tommy Douglas elected as their first leader. Regardless of the various manifestations of social democracy in Canada, its goal has always been to work toward a social justice agenda and eliminate inequity between people and regions. It is also worth noting that the agenda of social democrats was not much different from that of the social gospel movement. In fact, Tommy Douglas was a member of both.

The third thread we consider as a backdrop for social enterprise sector development is the co-operative movement. While the idea of co-operatives was imported from Britain, they were first successfully introduced into Canada by farmers with the creation of 1200 co-operative dairy and cheese factories between 1860 and 1900. Mutual insurance companies were established to protect farmers against the devastating damage that could be done by fire, hail and frost. This initial wave of co-ops was followed by the establishment of the Grain Growers Grain Company in 1906, allowing grain producers to market directly to Europe or to mills in Canada. The establishment of co-operatives mushroomed, with numerous farm sectors establishing smaller co-operatives to meet the needs of producers prior to World War 1. At the same time, farmers and industrial workers were busy organizing co-operative stores, and in 1909 in Hamilton, Ontario the Co-operative Union of Canada was established. The first co-operative banking venture was started in Quebec in 1900 with the establishment of the CAISSE POPULAIRE.

During WWI, Canadians became concerned about getting access to reasonably priced food. At the same time, farmers were seeking out ways to market their produce. With the increasing reputation of co-operatives during this time, co-operatives flourished. There was rapid growth in co-operatives. As MacPherson (2013) notes, "By 1919 most farmers wished to gain greater control over the marketing of their produce. They were soon drawn to the "co-operative pooling," a system

whereby members contracted to sell all produce through their cooperative and in return would receive dividends based on the quality of produce they supplied.” In 1923 and 1924, grain farmers used these principles to organize wheat pools.

The depression hit co-operatives hard and many dissolved during this period. Those that remained devoted themselves to membership development and education. This led to innovation within the co-operative sector. One iconic example is the Antigonish movement, in which study circles were established that provided the impetus for the development of community economies based on credit unions, fishing co-operatives, housing co-operatives and co-operative stores. During the 1940s and 1950s the co-operative movement continued to gather power and influence, gaining significant ground in the financial services sector with co-op insurance and trust companies. This growth and influence increased until the 1990s when co-operatives began to experience a number of new challenges. For example, many co-operatives in rural areas were faced with declining rural populations that meant fewer members and reduced resources and influence. The consolidation and growth of some co-operatives in the face of increasing globalization also presented challenges to co-operative principles and the sense of community ownership. While some co-operatives became institutionalized, new co-operative sectors continued to innovate. In spite of the development of new forms of co-operatives in recent years, the economic and social influence of the sector has not been as strong as in earlier years.

In summary, Canada has a history of movements and organizations operating on the principles of working collaboratively for equity and social justice. This history is foundational for the development of the welfare state in Canada post-WWII, premised on Keynesian economics.

With the arrival of the 1960s though, the world began to change. Lauzon (2012), drawing upon the historical writings of Hobsbawm (1994) and Lukacs (2002) has argued that the 1980s marks a significant turning point in the organization and structure of societies. However, to understand this critical moment means to return to the 1960s. It is during this period that the foundations for change were created through criticism of the epistemological dominance of the “culture of the expert”. The rise of the environmental movement, the civil rights movements, the anti-war movement, the second wave of the feminist movement and the continued erosion of colonialism in the developing world challenged structures, institutions and the very knowledge modernity was founded upon. This in turn gave rise to the emergence of postmodernism and epistemological pluralism. This pluralistic turn, in many ways, represents the beginning of the decline of Keynesian economics and the welfare state. Community economics, influenced by and growing out of the co-operative movement, also takes on more momentum in the 60’s and 70’s with the creation of community development corporations, and new forms of grass roots co-ops, community owned enterprises and neighbourhood associations.

In the 1970s we begin to see the emergence of neoliberalism and by the 1980s neoliberalism is taking stage politically front and center. There is a fundamental belief that less government is better, and that the most efficient and effective way of meeting the needs of people is to let the “free hand of market” direct development. This is accompanied by increasing globalization of the economy, trade liberalization, structural adjustment, and the rise of *New Public Management*. These changes are further intensified by the integration of communication and computer technologies giving rise to the virtual world we now take for granted. Geographer Harvey (1990) states that this virtual world leads to the compression of time and space whereby the rate of change we experience in our day-to-day lives continues to escalate.



In the geographical domain we are most familiar with—the province of Ontario—the rise of neoliberalism was expressed in the election of the Harris government premised on the so-called “Common Sense Revolution”. As with most neoliberal governments of the day there was an increased emphasis on reducing government spending through reductions in the services government provided to the people and communities of Ontario, as well as on the privatization of services. Government policies resulted in significant cutbacks and changes in how the non-profit sector was funded. Implicit expectations that the non-profit and voluntary sectors would continue to fill the gap that reduced government services created, but with fewer resources, caused incredible hardship in the sector and increasing need in communities.

### **3.0 The Contemporary Context**

Today these political and economic changes have led to a fundamental shift in the relationships between government, the private sector and the voluntary or non-profit sectors.

Since the 1980’s there has been a growing public distrust in the private and public sectors. While continuing to try to stem the effects of downloading, the privatization of public services, and economic recession, many community advocates have been re-evaluating the role and relevance of governments, and seriously questioning the ethics of the corporate sector. There has been a clear recognition that public policy now lags behind practice and that the community, with its allies in social development, need to lead the way in breaking down silos within government and between the sectors to bring about a more conducive environment and policy for healthy communities and economies. As we re-vision the development of our communities and local economies, we are seeing the growing imperative for collaboration within and across these “silos”.

In this new era we are experiencing the move from hierarchical social structures to networked social structures. As we do we are also witnessing a significant and renewed interest in and attention to social innovation. New types of organizations are being established to address social and economic challenges and capitalize on the energy released by breaking out of traditional roles and crossing sector boundaries. In all of this, collaboration is imperative for success.

In this context social enterprise is increasingly being adopted as a strategy for harnessing innovation, while addressing the needs of communities for sustained services and large-scale community impact or social change. While social enterprises have existed for many years in Canada, many of them arising through the social gospel and co-operative movements of the past, new players are entering the social enterprise “space” with models that further challenge our understanding of the roles of the non-profit, government and private sectors. This has led to a recent push for public policy to support social innovation and social enterprise sector development.

#### **4.0 Roles in Building the Sector**

Our reflections in this paper, as noted earlier, are focused on social enterprises that are located in the non-profit or community benefit sector.

To build this sector means to enhance the functioning of non-profits and social enterprises and to increase their positive impact in communities. Diverse activities contribute to sector building. Social enterprise sector development generally focuses on six strategic areas or “pillars”; these are: enhancing business skills of non-profits and social enterprises; expanding market opportunities; increasing access to capital; demonstrating value and impact; strengthening and engaging networks; promoting a supportive regulatory/policy environment (Mowat Centre for Policy

Innovation, 2013). Positive policy development must be founded on an understanding of all of these areas of activity, effective practice and innovation in each area in the field, and the knowledge of the leverage points that can be “pressed” to best foster sector development.

Many stakeholders contribute to the development of social enterprises and the larger social enterprise sector, sometimes referred to as the “social enterprise ecosystem”. Community based social enterprise practitioners, funders and social finance organizations, governments, individual investors and consumers, capacity builders/consultants, intermediaries, and postsecondary institutions all play important roles related to the strategic sector building pillars. In this paper, we are concerned primarily with three sets of stakeholders: practitioners, consultants and academic researchers and the links among them. Specifically, we focus on the historic roles of these stakeholders (what we call their primary roles) and how changes in the contemporary context have impacted roles in terms of knowledge, skills and capacities (what we call secondary and tertiary roles) and the resulting relationships between these stakeholders in the task of sector building. Using our collective experience, we identify the conditions that are enhancing the development of these stakeholder capacities and identify the barriers that need to be overcome.

Traditionally, we think of practitioners as delivering services, consultants providing capacity building support to practitioners, and academic researchers studying and/or documenting the outcomes and learning from the delivery of services. Knowledge is created at each level. Yet often this rich knowledge has not been consolidated or broadly shared across stakeholder groups to grow the sector and inform policy. Academics may have researched social enterprises, but their inquiries have not necessarily been driven by questions of importance or relevance to the social enterprise; rather they have reflected the academic interests of the researcher. Practitioners are learning about social enterprise every day through their daily work, yet there has been little time or opportunity

for them to reflect and contribute to a growing body of knowledge on social enterprise development and policy. Consultants who provide support services to multiple social enterprises and their funders often facilitate and contribute to learning, developing more strategic perspectives on what is required for larger sector development. Yet, they are not often consulted on policy or engaged in formulating questions for research that could contribute to sector growth. All of this is changing.

In the contemporary environment, with increasingly limited resources for non-profit services and organizations, but increased interest in social enterprise and social innovation, the need for cross-sectoral collaboration and more networked social structures becomes clear. The traditional roles of stakeholders in the social enterprise sector are being transformed. Consultants, practitioners, students and academic researchers are taking on new roles as collaborators and sector builders.

The following sections of the paper present the observations and reflections of the authors as academic researchers, consultants and practitioners working collaboratively with social enterprise in this changing environment.

## **5.0 The Academic Researcher**

Historically we think of the academic researcher as ensconced in the “ivory tower” contemplating, researching and writing on topics that from the general public’s perspective have no direct bearing on their day-to-day lives. Since the rise of neoliberalism, academic researchers have come under greater scrutiny from politicians and the public, who want research to have greater accountability and greater relevance to the challenges people face. There is an increasing emphasis on stakeholder driven research. This is something many academic researchers are not used to or comfortable with.

Given this, what role can the academic researcher play in building the social enterprise sector?

What follows are the personal reflection of this author as an academic researcher.

First, while the historic role of academic research—knowledge for knowledge’s sake—has come under scrutiny and criticism, there is a role for this type of research in the development of the social enterprise sector. Academics have a certain luxury that neither consultants nor practitioners have; time to think, reflect and to take a look at the larger picture. Part of developing the SE sector has to do with understanding how it fits in with and affects the “larger picture.” Academic researchers not only have the time to do this, but are actually mandated to do this. They also have access to research funds to work on these types of projects.

Increasingly, however, things are changing. For example, the Social Science and Humanities Research Council (SSHRC) now encourages partnerships, not only with other academic researchers but with communities, organizations and policy stakeholders. While SSHRC continues to fund the historic role that academic researchers have played, they are also trying to ensure that this research is relevant. The bottom line is that the taxpayer pays for it. Thus, there is a need to ensure that research remains relevant to the ultimate funder—the taxpayer.

One issue that arises is that the researcher who conducts traditional academic research that is published in peer-reviewed journals never really has any sense of whether it has made any difference to anyone. However, when I interviewed academic researchers they expressed some further concerns. Applied research does not necessarily lend itself to peer-reviewed publication, the currency of tenure and promotion committees. Most of the faculty researchers I interviewed were relatively junior faculty, and they expressed concerns about how their work would be

perceived and evaluated in the context of tenure and promotion. There are no “objective” impact measures for evaluating applied research!

Yet research is not the only part of academic work that is changing; so too is teaching. Increasingly there is an emphasis on service learning, taking students into the community where they can work on real issues with real people and organizations. This too is challenging, as it is often new territory for academics. In interviews we did with faculty who were involved in service learning, some talked about the challenges associated with this activity: ensuring students behaved professionally (even though technically they were not professionals); managing student and client expectations; managing ongoing relationships with clients; and mediating difficulties that may arise between clients and students. All of these activities take considerable amounts of time. Despite these challenges no one interviewed talked about changing what they did. They did note, however, that the faculty reward and accountability system did not account in any meaningful way for the changing duties and responsibilities associated with service learning. Realistically, it is much less work simply to give three one hour lectures a week than it is to organize and manage a chaotic service learning pedagogical process.

Part of faculty involvement in service learning has also spurred faculty interest in doing applied research, something that was an anathema to the traditional academic researcher. Academic researchers who currently engage in applied research tell us that they have found it exciting to see their work actually making real differences for real people. Often their work is sent off for peer review by a handful of other researchers who share their highly specialized interest.

Social enterprises are, in many ways, emblematic of the fundamental changes taking places as noted earlier in this paper. Like the non-profit sectors, universities too are beginning to reflect upon their

mission and role in larger society, necessitating new considerations about the way they conduct their business. This requires a change in institutional culture. The lone scholar is no longer able to address in meaningful ways the challenges we collectively face. These new challenges, along with changing expectations, require that the faculty and researchers reach out to others; not just other scholars, but to consultants and practitioners with an openness to learning. Scholars must learn to live within and negotiate the messiness of everyday life if they are to engage others, to engage in scholarship, research and teaching that meet the needs of people in the concreteness of their lived experience.

## **5.0 The Social Enterprise Consultant**

As consultants, our understanding of social enterprise is unique. It encompasses multiple perspectives, straddling different points of view.

Here are a few:

1. **The perspective of the practitioner or social entrepreneur** – Because we work closely with the leadership of an enterprise through its conception, planning and launch, we are familiar with every facet of its structure and operation. We are also connected to its leaders, their motivations and abilities. As consultants, we have a unique relationship with social enterprises. We understand the demands and challenges of running a business with a social mission.
2. **The perspective of the intermediary** – Our position is one removed from implementation, yet knowing the inner workings of the enterprises we work with, puts us in a position to assess these enterprises. This is knowledge that can inform funders' investments or greatly assist organizations in asking critical questions about their own work. Our unique position enables the consultant to compare successes and evaluate social enterprise outcomes

across the field. Given our exposure to many social enterprises from an “in-between” perspective, we are well positioned to recognize emerging trends and effective practices.

3. **The perspective of the funder** – because we often work with funders of social enterprise, advising them on investment strategies, coaching grant recipients and reviewing grant applications, we are well aware of the outcomes funders aim to achieve through their investments. We interpret funding requirements for our clients. This often includes the implicit intentions/desires of funders.
4. **The perspective of the researcher** – Every social enterprise consulting project involves a substantial component of research. Our research is by necessity grounded in practice; it is defined by our clients’ needs and realities, our need to ensure that clients get maximum value from the service we provide, and our years of experience in the field. This research not only directly informs organizations, but can also inform funders and policy makers.
5. **The perspective of the policy maker** – Because our work and success as consultants involves having practical experience and knowledge of the social entrepreneur, the investor, the researcher, we are aware of how policy is either enabling or disabling market growth and the success of SE’s. Equipped with this knowledge and experience, we are able to identify policy gaps that if addressed might effectively foster the growth of social enterprise.
6. **The perspective of the sector builder** - again it is our “in-between” or intermediate perspective amid the many actors in the social economy that allows us to identify the connections between stakeholders. Once identified, we can bridge the gaps, garnering



better support for SE development across the sector.

In doing our consulting work with social enterprises and non-profit organizations, we contribute to the building of local and living knowledge. When we facilitate market research, for example, we provide the tools for social enterprise practitioners to understand the market and think about market opportunity and how they can define and communicate the value of a product or service they wish to offer. With practitioners, too, we design and test new ways of doing business and social programming through social enterprise backed by theories of change and evaluation frameworks. Knowledge is created through these various activities as practitioners and consultants together synthesize and interpret information and experience. Over time, this is transformed into new understandings and capacities that help practitioners successfully run their enterprises.

Our work with practitioners not only results in specific knowledge for our clients, it also generates new learning for the field of social enterprise that practitioners and consultants can share with other non-profits, funders, policy makers, and investors. This role of knowledge broker transcends the traditional capacity building role played by consultants. It is increasingly important, we believe, as new players enter the field and as the social enterprise ecosystem grows more complex, to connect the experience and learning on the ground to new developments at other levels, including the design of financing tools and public policy.

In this paper so far we have looked at our evolving roles as consultants in linking the knowledge generated through our work with practitioners to larger sector building efforts. We now turn our attention to our changing roles with respect to linking social enterprise practitioners and post secondary institutions. Through these relationships, we are collectively finding new roles for consultants as intermediaries or brokers of skills, relevant research, and knowledge that go beyond

traditional capacity building with individual social enterprises. This increases our collective potential to contribute to social enterprise ecosystems development and a positive policy environment for social enterprise.

Playing the role of connector across sector stakeholders is now integral to what we do.

## **7.0 Collaboration for Systems Change**

Some consultants are adopting a role of linking students and academic researchers with social enterprises and practitioners. This may involve facilitating service learning with practitioners within social enterprises, and/or supervising or vetting academic research that is relevant to the field and grounded in the experience of practitioners and their clients. There has also been a significant move beyond the traditional role of the consultant as capacity builder with practitioners. These new roles may involve capacity building with students as emerging practitioners, or skills and research brokering. With practitioners, we have shared the role of identifying key research questions and helping to supervise students doing research and applied work related to social enterprise development. These nontraditional consulting and collaboration activities have resulted in enhanced capacity within non-profits for social enterprise development, more relevant research, and new opportunities and learning for students as emerging practitioners. We now see a greater possibility for the knowledge and skills developed through these collaborations to be disseminated more readily through diverse networks, and to broader audiences, with the potential for contributing to sector development.

Below, we outline some ongoing collaborations between practitioners and students/researchers/academics, as well as some possible avenues for new work:

### ***Student learning opportunities through field-work***

Students often have field-work components included in their course or program requirements. As they will soon move into the labour market, it is vital that students are provided with practical applications for their knowledge and research skills. Aside from preparing for jobs and careers, many students see field-work as an enhancement to their educational experience, and an opportunity to get out of the library or classroom. Much of the research conducted before launching a social enterprise can be taken on by student researchers, and in many cases this can give students an opportunity to participate in decision making around SE model development and market strategy. We have engaged student interns, field researchers and student volunteers to become members of our social enterprise development project teams. These strategic linkages are most advantageous when they are directed by experienced consultants/practitioners, and supervised by project managers.

### ***Practitioner-defined research can be enhanced through post-secondary involvement***

Too often, research projects and parameters are based around funding priorities or defined by academics who do not have a truly “on the ground” perspective. Research results often end up on library shelves, divorced from their potential influence on practice. It is very important that practitioners are actively engaged in defining their own research projects, questions and parameters. Consultants can play a role with practitioners in reinforcing the importance of the application of research results so that post-secondary collaborations can enhance social enterprise practice instead of just describe it or invent conceptual frameworks around it. While academics, as experts in research and pedagogy, have the skills, knowledge, tools, and time to clarify practitioner defined research projects, and assist

in defining methodologies and carrying out research activities (i.e. collecting and analyzing data), consultants can advocate with and for practitioners to keep research relevant to the enterprise and to the broader sector. Post-secondary involvement may also allow for a higher degree of credibility associated with research projects, which is advantageous to practitioners in making the case for their work to funders.

### ***Mentorship can be outsourced***

Student researchers can be mentored by consultant/practitioners and gain insight into many of the spheres of research that can't be learned from textbooks or in classrooms. The social dynamics of managing groups, the decision-making processes, how research informs practice in social enterprise, and effective social enterprise development and project management can be rich sources of learning for students. Working through conflict and witnessing the lived experience of social entrepreneurs and their positive impact on marginalized groups can be part of a firsthand experience of an operating enterprise that may (re)invigorate the learning experience for many students.

### ***Curriculum gaps may be identified through "on the ground" perspective***

There remain few relevant post-secondary curricula (e.g. rural development, social work, community development, environmental studies, business) that are focused on social innovation, social enterprise development, socially responsible business practice, and business ethics. Yet, interest in this area is growing. Social enterprise consultants, in collaboration with students and academics, can play a role in identifying and addressing the gaps related to building a more practice-oriented curriculum. New strategic linkages between consultant, practitioners, professors/educators, and student/researchers will result in the identification of relevant areas for study. This will further enhance the

development of new courses and the updating of current curricula and pedagogical approaches as we adapt to the changing social innovation context and practitioner needs.

### ***Evaluation of faculty members***

Faculty members are currently evaluated on three dimensions of their performance: teaching, research and service. These activities, within the context of performance evaluation and reporting, are treated as discrete elements. Yet, as we noted earlier in this paper, there is a 'messiness' to collaboration, service learning and applied research. Research, service learning and collaborative activities cannot be uniquely identified as belonging to any one of the three evaluative dimensions faculty are beholden to. Rather, they cross these boundaries in a way that makes 'partitioned' evaluation more difficult. As post secondary institutions and their faculty continue to challenge traditional approaches to learning, the opportunity for them to play a greater role in SE growth may depend on building recognition, or incentives, for these new forms of non-traditional research, teaching and service into faculty performance appraisals.

### ***Identify core competencies for success as a practitioner/consultant informing pedagogy***

As practitioner/consultants become more engaged with student researchers and educators, it may become clear that the core competencies for success as a social entrepreneur can be identified, and pedagogical methods and tools can be adapted to develop those capacities. This has the potential to influence the focus of education, training and field-work.

### ***Post-secondary institutions/educators and consultants can assist in attracting financial resources for SE work on the ground***

Collaborative relationships between SE consultants and post-secondary educators can multiply the opportunities for funding, and assist in developing combined funding portfolios for vital sector-building work and practice-based research. Some resources available through post-secondary institutions can be added to other traditional sources of funding for social enterprise development. Integrating SE research and development work, valuable resources can be directed for maximum learning and community benefit.

***Evidence-based research can be expanded/accumulated for policy recommendations***

Post-secondary institutions are beginning to collaborate with practitioners and consultants to undertake large-scale research projects. Through these long-term projects, credible data is collected and aggregated to track the development of social enterprise, funding infrastructure, and the related policy landscape. The results can produce the evidence required for effective recommendations regarding social enterprise policy initiatives and funding frameworks. This is an area of collaboration that could make a major contribution to the social sector as a whole.

These opportunities for social enterprise consultants to expand traditional roles by collaborating with practitioners and post-secondary students and institutions will likely grow in the future. Service learning and placement opportunities for students are becoming more desirable and an imperative in some faculties. Requirements for evidence-based approaches to social enterprise are increasing, and resources for non-profit social enterprise development continue to be barebones at best. These three trends, among others, compel the forging of innovative partnerships. The new roles, however, do not come without challenges.

The work associated with our changing roles as consultants, specifically in knowledge, skills and

research brokering and sector development, is rarely directly compensated. The burden of this work cannot be borne by individual social enterprises and non-profits already struggling to sustain themselves. Collaboration is costly in time and energy, and can be particularly unwieldy when working with both large institutions and grass roots groups. While faculty of postsecondary institutions may have the time to engage in collaborations, consultants and practitioners are more challenged to participate fully without added resources to cover their time. Funding sources for consultants' contributions to formal research and writing are few and far between. Further, the perception that consultants are exclusively self-interested can create a credibility gap that is a significant barrier to their contributions to the larger sector.

In the last few years there has been progress that addresses some of these challenges. For example, some non-profit and government funders are now funding social enterprise related collaborations between private sector consulting firms, non-profits and postsecondary institutions. The authors, for example, have recently embarked on several collaborative initiatives that have tapped both government and foundation funding for multiyear projects involving research and capacity building with grass roots rural social enterprises. These projects aim to link social enterprise practitioners across regions and across rural and urban constituencies, and to share the knowledge generated through research and practice across the larger social enterprise sector. There is some way to go, however, in the social enterprise sector, in recognizing and valuing the contributions of all three stakeholders – consultants, postsecondary researchers, and practitioners – as active and important co-creators of the evolving social enterprise ecosystem.

## **8. Collaboration and Blended Value: From Traditional Roles to Capitalizing on Assets**

How can researchers, consultants, and practitioners collaborate to contribute to the growth and scaling of SE ideas across urban and rural constituencies?

### **Blending Value and Assets**

One concept that may be helpful in thinking through how various stakeholders can contribute to sector growth beyond primary roles, or across traditional silos, is that of “blended value”. This concept has been adopted by many actors in the social enterprise sector based on the work of Jed Emerson. In the United States, Emerson challenged investors, social entrepreneurs and philanthropists to move beyond the concept of singular interest and to focus “upon how to do well and do good - a shift from an ‘either/or’ value proposition to a ‘both/and’ value proposition.” (Emerson, [blendedvalue.org](http://blendedvalue.org)) This “blended value proposition” has led foundations and others interested in maximizing their impact to think more broadly about potential ways existing assets can produce positive impact in their communities. Generating “maximum value” for the social enterprise sector means capitalizing on the diverse assets of all stakeholders in the system. These assets can include those of practitioners and their agency clients and non-profit organizations, consultants, postsecondary faculty, students and researchers, and academic institutions. Paralleling Emerson’s work, some of the assets of the stakeholders we consider in this paper might include:

- Financial assets and funding from diverse sources that were previously accessible only by certain stakeholder such as universities or non-profits are now more easily accessed through collaboration with stakeholder partners. For example, grants intended for university researchers can now include consultant and practitioners partners. Alternatively, university researchers now often partner with practitioners in applying to foundations.



- Intellectual assets, or the knowledge we generate through collaborations among people from different locations (geographic or institutional), and with different perspectives.
- Human assets such as our skills, values and experience. This includes our capacity to grow our own skills and experience through collaboration. Agency clients, practitioners, academics and researchers, and emerging practitioners all bring significant human assets to the collaborative process, and everyone has the capacity to learn and develop new skills.
- Political assets to affect policy change can be better leveraged when credible evidence based research with practitioners is associated with institutions such as universities and colleges.

### **Challenging Traditional Roles and Identities**

New collaborations between social enterprise practitioners, consultants and researchers challenge each stakeholder to go beyond our particular interests and create collective skills, knowledge, and impacts. Collaborations become a new site for learning. As active participants, we go beyond our comfort zones to find synergies that are only possible when working in new ways with others. Putting all of our “asset classes” to work in collaborations gives rise to a new set of tertiary roles that are defined in the process of working together. These roles generally cannot be prescribed or even predicted at the outset of a collaboration. Rather, they shift with the project and the players. Often they entail playing roles that are more traditional for our other partners. For example, urban situated SE stakeholders become advocates for rural social enterprises and represent their interests to funders in project and resource development, or presenting case studies at conferences, when rural partners may not be able to participate. While practitioners create environments for students learning, students can mentor practitioners in understanding research and how it can be

used for resource development. Academics can bring evidence of effective practice gleaned through research to policy makers and expose new policy opportunities. Finally, consultants can teach and supervise students with practitioners to bring new capacities to the non-profit social enterprises, and can broker new skill building opportunities for these emerging practitioners.

While traditional roles and identities are being challenged, there is room for more and more people to build the sector. Systems change leaves no one outside because everyone has a developmental role to play. Although the territory is largely uncharted, the shifting of traditional roles and the adoption of secondary and tertiary roles may come as a welcome opportunity for all stakeholders. The real social innovation of today may be best described as a “liberation of connectivity”. The new forms of collaboration among social enterprise practitioners, consultants and researchers are just a few examples within the various divisions of sector and service.

### **Building Infrastructure for Social Enterprise Growth**

There are examples of collaboration on the part of foundations/funders, financial institutions, government, corporations, umbrella organizations, universities and social service organizations to develop social enterprise capacity, build the supportive structures, and establish the financing tools for social enterprise and the sector that supports it. Now more than ever there is a need to “connect the dots” as more players are entering the social enterprise space. We are witnessing a burst of activity, from the development of individual social enterprises, to social finance tools, regional centres for social innovation and social enterprise, and schools for social entrepreneurs.

Community assets that could be mobilized for social enterprise supports, regionally and provincially, remain scattered. Many of the building blocks of a more organized SE infrastructure

already exist, but they are largely disconnected. In rural communities, the disjointed nature of community and SE infrastructure is exacerbated by other socio-economic trends. If the links are made, though, many of the community assets necessary for a social enterprise eco-system could be aligned to create a more cohesive whole. This would provide a continuum of support for more rapid SE advancement. There is a need for both individual capacity development and community capacity development. These may simultaneously be worked on while funding infrastructure and policy is developed to serve the needs of organizations and their social ventures.

Developing a cohesive, well-coordinated structure that incorporates the many inputs and contributions of multiple stakeholder groups is therefore essential to creating both localized and cross-regional infrastructure. The new collaborations we are forging with practitioners in our work as consultants and academic researchers is predicated on the hope that we can mobilize our collective assets and energies and brings a new level of intentionality to building an effective social enterprise ecosystem.

### **Working Together Towards “Enabling” Policy Development**

Little public policy pertaining directly to social enterprise currently exists. This represents a veritable “wild west” of SE development. Legal frameworks simply have not kept up with social enterprise and social finance practice. No commonly accepted definition of ‘social enterprise’ is shared across the sector. Indeed, the reluctance of public policy makers to intervene in the growth of new market-based solutions to pressing social and environmental problems is considered a healthy sign by some. However, creating enabling environments for communities to contribute to their own development remains an important role of governments at all levels.

SE sector development is enabled by effective policy. This means we must collectively identify new policies that will contribute to the positive evolution of the sector. It likewise means recognizing and advocating for the removal of regulatory barriers that inhibit either social enterprise generally, or the design and implementation of effective and coherent structures of support. Poor policy decisions can greatly hinder the growth of the social enterprise sector.

Public policy is built on knowledge legitimized by research. Supportive public policy must be informed by an understanding of the unique nature and contribution of social enterprise and the non-profit sector in the context of community economies. Policy makers need an accurate picture of the social enterprise landscape, its players, the linkages and potential linkages between them, its effective practices and pillars of support. Unfortunately, there has been very little research on the social enterprise sector to date, and various levels of government are struggling to define and see where this practice fits within their various programs and initiatives. The non-profit and private sectors are not yet viewed properly as distinct yet linked in the larger proposition of building healthy communities.

This makes the study of social enterprise, documenting its growth, trends, innovations and promising, emerging practices, and sharing this learning all the more important. We would argue that there is significant knowledge in the sector. Collectively, we need to find ways to legitimize that local knowledge. Valuing practitioner-based knowledge requires shifting power relationships. In a paradigm of “emergent change”, we recognize the pluralisation of knowledge creation.

This paper, illustrates the significance of the growing strategic linkages and shifting roles between social enterprise researchers, consultants and practitioners. Combining our assets, and crossing the boundaries of our locations and traditional roles to develop evidence-based frameworks for

understanding SE development will assist all sector stakeholders in their respective practices. It will also assist in identifying leverage points that will lead to enabling policy. All of this together will result in a stronger, more coherent and impactful sector.

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