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| Select your assignment question. | Submit your assignment. |
| Establishing governance: How does a community of people make good decisions that lead to real action? | L3 assignment question:Assigned question: How does a community of people make good decisions that lead to real action?By seeking evidence on which to base decisions and then seeking the people with expertise and experience to analyze, interpret and suggest interventions based on logical reasoning.This answer contrasts knowledge to opinion.My personal context:Was a hippy in the 60s and 70s with lots of good intension and suggestions to change the world. A consensus opinion based movement. The flower power era had some positive influence such as contributing to the USA pulling out of the Vietnam war. Overall nothing has changed and for example we have seen the USA again enter into armed conflict in foreign land on the basis of fabricated evidence for the presence of weapons of mass destruction. The “establishment” that was our enemy then, it is still in full control.I also had aptitude for math and science so developed a passion for data and eliciting meaning from it. I worked on issues of climate change before the term global warming ever became part of the vernacular. My specialty was numerical modeling of ocean processes and with partners we build a company to look at such problems. I had switched to the domain of evidence based decision making, but still had all my passions and convictions to make a better the world.What I have realized is a difference between most so called “activists” and the “establishment” : the former relies on opinion-based decision making, while the later relies on evidence based decision making. Unless we are ready to abandon the progress made since the Renaissance and go back to the Dark Ages, those that make evidence-based decisions will always be the winner.Presently I see big business, that clearly is using evidence-based decision making to attain their goals, playing the populace into electing populists parties. They are winning by manipulating popular opinion. Check-mate on that round!For many “evidence based decision making” has become the enemy, when in reality it is the purpose to which it is used that is the problem.I now am the founder and president of a burgeoning charity in my town. Food for Thought Ottawa feeds thousands of people who are unable to do it themselves. I am applying all my experience to evidence based decision making in order to feed people in need. For the most part the people we feed were previously ignored by the charity community for lack of paying attention to evidence. I have the greatest compensation possible from my work: the certainty that I am helping people. I get no financial or other advantages from my role. This is true for many among our group, but some are salaried because they need revenue to survive. For all of us the greatest compensation is intangible. Our whole group in furiously passionate. The evidence I see about Social Acquisition in my town is distressing An example is the privatization of Hospital Food Services 4 years ago, a Not For Profit corporation created by a consortia of hospitals in Ottawa to handle food production amongst their midst. After decades of operations HFS was acquired by Apetito, a for profit corporation headquartered in Europe. All universities in our city, except a very small one with about 300 students, now outsource food services to Aramark or the like, huge international food service corporations, this one based in the USA. The largest school board in Ottawa has an exclusively outsourced operation its in school food services to Compass. All of this happened over decades with no one noticing, no fanfare, no announcements. This is the reality and evidence of Social Acquisition in my town.Food for Thought recently acquired its own kitchen to work from. We took over the premises from a 72 years young caterer looking to scale down his business. He has moved a few blocks down the road. The experience and knowledge of the people involved made it work. The one piece of assistance we asked for was financing from illusive social investment funds and all we found was vacuum behind Power Point presentations. We had to ply our own resourcefulness and contacts to get hundreds of thousands of dollars of debt financing. My question is: What problem is the Social Acquisition Institute trying to solve? |
| Establishing partnerships: When you picture an institute that fosters meaningful partnerships to advance the social acquisition solution, what do you see? | Our answer focused mostly on the building blocks of an approach, rather than a prescriptive answer. While we both see the value in aspirational, generative moments, they tend to be best shaped by empathy and a scope of the environment, which neither of us has at this moment. This means our answer to this question centred around two points of interest. The first is a meaningful understanding of the problem space that the institute seeks to enter. Both of us come from a background of new venture creation and validation, and our agreement on this point was clear. It is crucial for any institute to understand comprehensively not only the ecosystem it works to engage with, but also specifically the needs of the users/clients/participants in the ecosystem. The institute should engage empathetically with these participants and seek to build a validated understanding of the unique value it can create, before assuming any particular activities would be advantageous. We shouldn’t underestimate the importance or difficulty of doing this; a few conversations would not meet the criteria here. It would also be very important that anyone engaging in this problem be exceptionally mindful of not ‘leading the questions’ or jumping to solutions before understanding. Questions such as “would you like if [solution] existed?” as an example, would not be appropriate. In terms of the existing documentation provided, a shorter approach more aligned with something akin to a canvas may be preferable (though given the need for problem definition, perhaps too early?). The primer is a strong resource in generating excitement, and is a partial resolution of this, but we’d like to see a clear, validated description of the user/participant and the problem they face. It may be that sufficient confidence has already been built towards this, but we both exercise particular caution on this point. There are a variety of tools to support this kind of approach, and we’re confident that the leadership of this project understand them thoroughly. The second is the recognition of the norms of institutes generally as bodies of advocacy. Therefore, this point of interest is dependent on the first; we’re assuming an institute in a general sense is a necessary and sufficient solution to the problem space. Given that, “what we see” in picturing an institute that fosters meaningful partnerships to advance the social acquisition solution is an institute can become both a connecting force for those interested in the topic. The same institute can also work towards being seen as a thought leader in the space; whether it’s government or other bodies that have questions, they look to the institute for answers first.  From this perspective, the institute would provide educational programming and awareness building activities. It would also seek to build and leverage partnerships to push the sector further. Evaluation is important to mention here. An institute aligned in this direction would need to, from the well-defined problem space, have a clear theory of change, and some degree of validation that the theory of change is appropriate for the problem space. We both acknowledge that in early days organizations well tend to have the theory but not the evidence, which magnifies the importance of understanding the problem space. In summary, any evaluative mechanism (measuring for example outcomes and impacts), would need to be reconciled with the problem/solution dynamic and adjusted over time as new information flowed in. This same set of activities would need to be couched with a capability in foresight, since any problem set will change over time, and the speed of the institute may need to attempt to match the speed of the problem. Lastly, we noted that from this perspective of [Starting with problems -> Clear at where the organization fits -> (What are we good at?)], the institute will likely have to make difficult choices about its structure and function in the coming years. This makes these building blocks fundamental to success and trajectory, and not a box to be checked. We also feel that these building blocks should be structured into the institute itself, not just the solution, and in this way we begin to make connection with some of the other questions asked around governance, research and awareness. Importantly, our feeling is that the institute itself should be reflective of the problem/solution dynamic it seeks to engage. This means that staffing, leadership and in particular board composition, would be to the fullest extent possible given composed of people with deep and diverse experience in the space. In particular, lived experience of this problem/solution dynamic over credentials would be preferred in this make up. |
| Establishing partnerships: When you picture an institute that fosters meaningful partnerships to advance the social acquisition solution, what do you see? | We see a backbone organization that promotes and raises awareness about social acquisition (marketing, creates a "brand"); aggregates research, tools, and a network of champions that ensure smooth social acquisitions; and structures itself in a way that reflects the values it seeks to promote (namely, a cooperative governance structure). |
| Establishing partnerships: When you picture an institute that fosters meaningful partnerships to advance the social acquisition solution, what do you see? | An institute that fosters meaningful partnerships to advance social acquisition has developed a strong acquisition fund to support researching and mobilizing successful business owners to plan for a transition to a Coop/SA enterprise before they are already in trouble. We also see an institute that is guided by values of collaboration, curiosity, deep listening, and skilled in communication and bringing people together to connect, harvest wisdom, and co-create innovative solutions. |
| Financial contributions: If you contributed financially to a social acquisition institute, what would you expect to gain from your investment? | [We] believe that as an investment, contributing financially to a social acquisition institute should create an ecosystem of concerned individuals and an organization of cooperators that care about more than just financial gain.We also believe that the investment should create and analyze data to encourage informed and educated decision making, thereby contributing to the development of better products and services which has a cooperative and wholistic gain as opposed to individual interest. |
| Generating awareness: Who are the people that most need to know about social acquisitions, and why? | - Tax Accountants especially for charities because of CRA implications- Accountant with coop experiences- Additional charitable organizations who could be acquirers or have experience running social enterprises- Other financing partners especially equity for for-profit social acquisitions including for profit worker coops, ESOP acquisition- Non-profit board members – if NPOs are to acquire a business, they should be familiar with what that means incl. financing- Professionals that support business owners: business advisors, valuators, lawyers, personal banker |
| Generating awareness: Who are the people that most need to know about social acquisitions, and why? | The following are groups that we feel need to understand the benefits of social enterprise as they are in a position to facilitate conversions to, and creations of , social enterprises in the future.Professional accountants , lawyers, and other advisers need to know of the Social Enterprise alternative to advise their clients.Local Government agencies such as Small Business Centres ,City Departments such as Tourism, Local Economic Development Corps, and BIA's.Chambers of Commerce and Investment groupsLocal Anchor Institutions like Hospitals and Municipalities that make large purchasing decisions.Established Social Enterprises and Indiginous groups as potential purchasers or creators of Social EnterprisesEducational Institutions including Colleges , Universities and High Schools should understand and be able to teach, advise and provide research opportunities for students.Financing Sources such as Banks, Credit Unions, Government Agencies, Angel Investment Groups, and NFP grant issuing organizations.Senior levels of Government.  |
| Generating awareness: Who are the people that most need to know about social acquisitions, and why? | There are roughly six key stakeholder groups to prioritize for engagement. The first and most important are SME owners. Without their interest and support, no social acquisitions are possible. The second stakeholder group of nearly equal importance is transition professionals, such as lawyers, accountants, and professional social acquisition facilitators, including co-op developers, social enterprise consultants, etc. If even a portion of this stakeholder group understands the value of social acquisitions and is looking for options for SME owners, they may suggest this option to their clients.  Another important group is trade unions."  Finally, lower priority stakeholders include elected officials and bureaucrats for a hospitable policy environment, academics to help influence the policy environment, and, last but not least, leaders of investment funds, banks, and other financial institutions with social good investment portfolios. |
| Generating research: What are the questions/what is the question that we need the answer(s) to in order to catalyze widespread adoption of social acquisitions? | Critical to widespread adoption of social acquisition is where the funding is coming from and what are the rules around it. Key to this is the backbone organization and its functioning. We should review existing backbone organizations to see if there are any that could be adopted and/or modified to move social acquisitions forward in an effective and efficient manner. I think that the Community Wealth Co-operative Corporation is an example of one such organization. In addition, we should be looking at structures outside of our dominant culture. We are really talking about system change not working within the current financial structures. |
| In-kind contributions: If you contributed your labour, expertise, or non-financial resources (office space, equipment, technological infrastructure, etc.) to a social acquisition institute, what would you expect to gain from your investment? | * Our work should be in the context of sharing our experience and learning from each other.
* Partnerships should be the goal, clusters as opposed to hierarchical structures, noncompetitive.
* We should share resources and wisdom with a goal of creating reusable materials.
* Organizational structure should be clear and transparent with a stated governance structure.
* It is imperative to have a strong mission focus, “mission before financing” yet we cannot ignore the financial realities.
* Danger of mission creep when chasing financing.
* Embrace the regional nature of our work. What works in Quebec may not work in BC, what works in Alberta may not be appropriate for Newfoundland. However we need to ensure that we are constantly communicating with each other to identify learnings, opportunities and challenges.
* Diversified funding sources will be key for the long-term success of this project.
* It might be beneficial to create a long-term fund where coops pay it forward for future development.
* Twofold focussed rooted in reality: Mission/Values and Financially Sustainable
* Work to focus on creating usable, shareable, bilingual material.
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| Peer learning: Describe a professional culture that makes you feel comfortable sharing your experiences and being vulnerable. | PEER LEARNING: DESCRIBE A PROFESSIONAL CULTURE THAT MAKES YOU FEEL COMFORTABLE SHARING YOUR EXPERIENCES AND BEING VULNERABLE.A curated environment of conscious individuals with shared values and motivations structured with a mutual understanding of confidentiality and ongoing participation that fosters a sense of trust, safety, communication principles, and empowerment. An example of this is a peer group model such as TEC(https://tec-canada.com/) An organization that facilitates peer groups of business owners and executives. Each curated, small group (12-14 members), shares a motivation to participate and individuals receive measurable value for their memberships. The groups are confidential, monthly meetings where members come together to share issues they are experiencing, learn from each other, hear guest presenters and most importantly feel safe. Participation is consistent and the groups are moderated by a Chair of the umbrella organization TEC.Group members are vetted and agree to participate under strict parameters established by TEC. The parameters include commitment obligations that are put in place for the success of all members.Most importantly the formal structure creates a sense of security to allow the members to collectively achieve the desired outcomes of the group and it’s members. Trust is the foundation of the success of these groups. |
| Peer learning: Describe a professional culture that makes you feel comfortable sharing your experiences and being vulnerable. | A professional culture/environment that encourages sharing of experiences and vulnerability has individuals/organizations that emphasize and foster collaboration (vs. competition). A collaborative environment includes high trust, shared/common values and interest - i.e. like minded people. The connection may also be more informal or a formation of a loose community that encourages experimentation and correspondingly failure. As well, rather than a black and white environment, it is one that is greyish, with no obvious right or wrong. When people gather together in this environment, there is comfort in taking small risks and going from there. There is the willingness to try new things, and encouraging an open mindset. |
| Financial contribution: If you contributed financially to a social acquisition institute, what would you expect to gain from your investment? | * Depends on who is the target audience for investors
* Depends on what they value

**Potential Target Audiences:**1. Municipalities
	1. Economic development for revitalization
	2. Would like to see action

1. Provincial & Federal Government
	1. Would like to see reports and numbers
	2. More statistics based on key identified areas of interest. i.e. farming, small businesses
	3. Focus on economic development

1. Private companies/consultants (accountants, lawyers)
	1. Publicity
	2. Networking
	3. Recognition
	4. Directory/referenced
	5. Training
	6. Developing specific capacities

Could create special projects to find investors1. Religious Institutions partnership
	* The success rate of churches from closing
2. Tourism
	* The success rate of tourist businesses
3. Cooperative Institutions
	* Increase the number of cooperatives which is reflected in the rise of their membership
	* Increase the number of cooperative and help put pressure on governments to increase the amount of funding to co-ops as well as policies that support and promote cooperatives.
4. Philanthropists

Membership vs Investors* Membership
	+ If the institute is a not for profit then can give a charitable receipt
	+ These people want to learn about how they are meeting the mission. Clear cause that is mobilized.
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