L3 LEGACY LEADERSHIP LAB

COMMUNITY CONTINUITY REPORT

May 11th, 2021

UNIVERSITY OF WATERLOO

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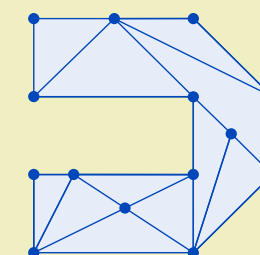
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PREFACE

Social acquisition presents an opportunity to apply the transformative potential of social finance at scale to mainstream small- and medium-sized enterprises (SMEs) across Canada.

The Legacy Leadership Labs (L3) 18-month initiative, a Social Finance Fund Investment Readiness Program ecosystem mobilisation partner, assembled a wide range of stakeholders to create a pipeline for the conversion of conventional businesses into social purpose organizations. As L3's initial funding comes to a close, the social acquisition community has an opportunity to sustain and deepen L3's work. This document presents a continuity strategy emerging from conversations with and priorities set by the L3 community, leveraging the collective action mobilized through L3 and its network. The continuity plan simultaneously leverages L3's original work while anticipating the future needs of Canada's social finance systems to make greater use of social acquisition as a tool.

This report is for those connected to the L3 Community and other stakeholders who see themselves as part of Canada's social acquisition solution. For a more detailed breakdown of the stakeholders who have actively been involved up to this point please consult the L3 Stakeholder briefs.

INTRODUCTION

Context

L3's initial plan was to assemble representative stakeholders from across a possible social acquisition ecosystem for a series of in-person codesign events. In light of the pandemic, delivery pivoted to a virtual, asynchronous, and modular model that opened the process to a wider range of participants while adapting to the new work-from-home reality. In doing so a broad network with several nested and focused sub-communities merged to take ownership of different elements of the social acquisition system. In-line with but adjacent to the initial goals of L3, the demand for information, stories, best practices, and frameworks to support the growth of the social acquisition strategies that were quickly gaining traction as COVID-19 closured brought many to reconsider the role of the SMEs in communities across Canada.

SOCIAL ACQUISITION CONCEPT AND STRATEGY

Mid-way through the project, L3 coined the term "social acquisition" to describe business and ownership transitions into social purpose organizations to capture a number of different kinds of conversions, including:

- Co-operative conversions, which can include
  » Employee buy-outs
  » Consumer buy-outs
  » Community buy-outs
  » Multi-stakeholder/multi-share buy-outs
- Non-profit acquisitions
- Purchase and transition to a for-profit social enterprise through for-purpose designations
- Any combination of the above

Social acquisition is a solution at the intersection of three overlapping market needs:

- The need for more investible social enterprises to ensure the successful delivery of the Government of Canada's planned $755 million social finance fund.

- The need for more and better exit options for small businesses with retiring or exiting owners, particularly those serving remote, rural, and under-resourced communities (we estimated that over 700,000 SMEs were at risk of closure due to ownership exits.

- The need for viable community-oriented employment and business recovery options for communities experiencing employment, financial, and business resilience challenges in a post-pandemic economy (we can compound our earlier succession-related figure with CFIB's estimate of over 180,000 businesses at risk of closure due to the pandemic).

As L3 concludes this iteration of its efforts, it has uncovered through discussion and co-creative activities a strong demand and a deep need for further supportive work in this rapidly growing field.

The path forward

The continuity report examines the following core questions:

- Which existing L3 elements have you found most and least useful?

- Which L3 elements are essential to continue?

- Which elements have been missing that are essential to integrate into any continuity efforts?

- Which continuity pathways are best to achieve the above?

Laying the foundations for a path forward involves answering these questions with and within the L3 network. Part of the answers came from conversations and workshops with L3 participants, and part was to solicit direct information, such as ideas, activities, and priorities from people within the network through a participatory budgeting process. The results of this process were used to set plans for strategic network priorities and relevant academic literature was consulted to make additional recommendations for the implementation of these priorities.

ENGAGEMENT AT A GLANCE

Over the course of its event-based research, design, and community development initiatives, L3 has engaged a community of over 600 individual practitioners, stakeholders, and leaders seeking solutions to advance social acquisitions in Canada (a community that has grown from roughly 100 contacts since November 2019). Those events included

5 ACTIVATION EVENTS,

21 DESIGN GROUP EVENTS,

4 MAJOR DESIGN EVENT,

6 COMMUNITY EVENTS, AND

1 SOCIAL EVENT,

and involved supporting a total of 16 different design prototypes and 14 different activation leaders dedicated to expanding access and awareness to social acquisition knowledge and research.

THE LEGACY LEADERSHIP LAB STORY SO FAR

Original conception

The Legacy Leadership Lab was conceived as a pan-Canadian social innovation lab that would consist of five workshops hosted in five major Canadian cities from January 2020 to February 2021. The workshops would employ an extended version of the Social Innovation Lab model developed by the Waterloo Institute for Social Innovation and Resilience. The following table outlines the planned format.

In between the workshops, L3 would be compiling collected workshop data, conducting research, and producing essential knowledge products to reinforce the participants' design efforts and inform the future direction of social acquisition design for the purposes of growing the Canadian social and cooperative enterprise sector.

The MAP Toronto workshop by DUCA Impact Lab was successfully delivered, while the FRAME Halifax workshop was transitioned to an online delivery and branded ATLANTIC ONLINE. Visit the Past Workshops webpage for overviews of these workshops as well as their Waterloo Region counterparts.

▼ ORIGINAL LAB MODEL

Pre-pandemic lab process, consisting of five workshops in five different Canadian cities

MAP	JANUARY 2020	TORONTO, ON	Lead sponsor: DUCA Impact Lab 1. Build a visual model of the conversion-through-succession system 2. Identify key actors in the system
FRAME	APRIL 2020	HALIFAX, NS	1. Clarify and prioritize key bottlenecks in the system 2. Design ways of reducing, removing, or working-around these bottleneck
BUILD	JUNE 2020	WINNIPEG, MB	1. Build small-scale interventions that participants can test 2. Provide a model for how to collect and share results of testing
LEARN	OCTOBER 2020	VANCOUVER, BC	1. Evaluate first round of prototypes 2. Design new prototypes based on what has been learned
LAUNCH	FEBRUARY 2021	MONTREAL, QC	1. Bring successes to scale 2. Develop recommendations based on learning

THE LEGACY LEADERSHIP LAB STORY SO FAR

Mid-project (COVID-19 impacted) pivot

By the end of February 2020 it was evident that the extensive traveling and in-person events outlined in the original project plan would not be possible during the country-wide public health measures enacted to curb the spread of COVID-19. As registration planning had already begun for the Halifax workshop, L3 pivoted quickly to deliver a three half-day workshop called ATLANTIC ONLINE, closely modelled after the original in-person event. L3 simultaneously began to plan a wider re-working of its delivery model and project focus to leverage the advantages and mitigate the drawbacks of a fully online format. In June 2020 the first Community Event assembled the entire network of stakeholders to present the new model.

The new format would effectively focus on three interconnected streams of activity: Design, Activation, and Community. The pivot incorporated the original design and development intentions of the Lab while decentralizing the design process and emphasizing the role of the greater social acquisition ecosystem and stakeholder presence possible in an online setting to maximize connectivity between the various actors.

These graphics articulate the streams and their interconnectedness in building and reinforcing the social acquisition system.

DESIGN STREAM
Composed of *design groups* focused on specific opportunity areas or initiatives

L3 COMMUNITY

Design Stream provides pilot initiatives to communities in the activation stream

ACTIVATION STREAM   **DESIGN STREAM**

Activation Stream provides insights into needs and desires for initiatives

CONCEPTS

IDEATION
Explore, evaluate, and prioritize concepts

DISCOVERY
Collect insights and create design principles

DESIGN PROCESS

KNOWLEDGE PRODUCTS

DEVELOPMENT
Develop, prototype, and pilot a concept

INITIATIVES

INTRODUCTION
Learn about Social Acquisitions for Business Recovery (SABR)

ACTIVATION
Strategize to activate a community

SYSTEMS
Explore and map the social acquisition system

Activation groups go on to advance SABR in their community

ACTIVATION STREAM
Composed of *activators* who have connections to a specific profession, geographic area, economic sector, or impact area.

In June 2020 we began to shift our lab process into the stream model. We still ran a couple of large design workshops, BUILD and LAUNCH, but these were complemented by the activities of smaller Design groups, Activators, and Community Members.

COMMUNITY

AUGUST 2019

Join IRP as an Ecosystem Mobilization Partner

JANUARY 2020

Toronto MAP workshop presented by DUCA Impact Lab

APRIL 2020

Atlantic Online FRAME workshop

JUNE 2020

Design, Activation, and Community Streams launched

DESIGN

DECEMBER 2020

BUILD design workshop

FEBRUARY 2021

LAUNCH design workshop

ACTIVATION

THE LEGACY LEADERSHIP LAB STORY SO FAR

Design, activation, and community streams

Since the pivot, L3 has been operating an extensive event-based effort to convene the network and conduct and support co-creative design of social acquisition service prototypes, while also capturing and curating essential research on social acquisitions (including case study writing and support).

From June 2020 to end of April 2021, L3 delivered:
- 5 Activation events,
- 21 Design group events,
- 4 major design events,
- 6 community events, and
- 1 social event.

DESIGN
The Design Stream convened 7 design groups focused around different opportunity areas and supported 16 different prototypes at our major design events. These prototypes ranged from ideas for innovations to market-ready products and services, some of which are currently being piloted or launched.

ACTIVATION
Activation efforts convened a total of 14 participants who together were connected to nine different stakeholder groups in the social acquisition system and worked together to deepen their understanding on how to engage and activate these groups. L3 hosted five activation events to assemble activation knowledge and capacity and collect insights on how stakeholders understand themselves as fitting within the social acquisition system. The Activation Stream helped produce key elements of the stakeholder maps that were an essential ongoing and final L3 knowledge product.

COMMUNITY
L3 assembled a wide array of stakeholder groups from many different professions and organizations. Broadly speaking, L3 Community members fall into the following categories and sub-categories:

- **Conventional essential business service providers**, such as
  - » Accountants
  - » Lawyers
  - » Financial advisors

- **Conventional business service providers for business buyers and sellers**, such as
  - » Business valuators
  - » Business brokers
  - » Exit planning advisors

- **Business service providers with social purpose conversion experience**, such as
  - » ESOP developers
  - » Social enterprise and co-operative developers
  - » B-Corp certifiers
  - » Social enterprise incubators and accelerators

- **Traditional business finance and investment service provider**s, such as
  - » Business insurance providers
  - » Commercial real estate providers
  - » Venture capitalists and investors
  - » Search funds
  - » Banks
  - » Business loan providers and funds

- **Social finance and investment service providers**, such as
  - » Impact investors and funds
  - » Co-operative investors and funds
  - » Credit unions
  - » Community and family foundations

- **Economic and workforce development service providers**, such as
  - » Local/regional/provincial/national economic development organizations
  - » Local/provincial/national chamber(s) of commerce
  - » Trade and Business Associations
  - » Business Improvement Areas (BIAs)
  - » Labour, worker, and trade unions and organizations
  - » Worker co-op associations

- **Workforce and education service providers**, such as
  - » Researchers and educators
  - » Trade and business schools and education

- **Social inclusion communities**
  - » new Canadians
  - » Youth (under 30)
  - » Seniors (over 65)
  - » People of colour
  - » Indigenous peoples
  - » LGBTQ+ identifying
  - » Women identifying
  - » Living with a physical disability
  - » Living with an invisible disability (learning, trauma, mental illness)
  - » Living with addiction and recovery
  - » Returning from the prison system
  - » Returning from military service and veterans

THE LEGACY LEADERSHIP LAB STORY SO FAR

Community growth

The Legacy Leadership Lab Community has been growing steadily since we first began recording contact information back in November 2019. It now stands at over 600 individuals as of April 28, 2021.

Since its launch in August 2020, L3 has employed a Slack workspace to assemble and organize its Design efforts. Engagement on the platform has been active since then - see chart below. Slack now has 88 members (including L3 staff), and the platform serves as a key communication channel for asynchronous participation in social acquisition design efforts.

TOTAL COMMUNITY MEMBERS

ACTIVE SLACK MEMBERS

See how many people are active — meaning they posted a message or read at least one channel or direct message.

Weekly   Daily

- Weekly active members   - Members who posted

L3 has an established brand and online presence through LinkedIn, Facebook, and Twitter. The numbers below are current as of April 28, 2021.

	LINKEDIN		FACEBOOK		TWITTER
in	144	f	71	(twitter)	100

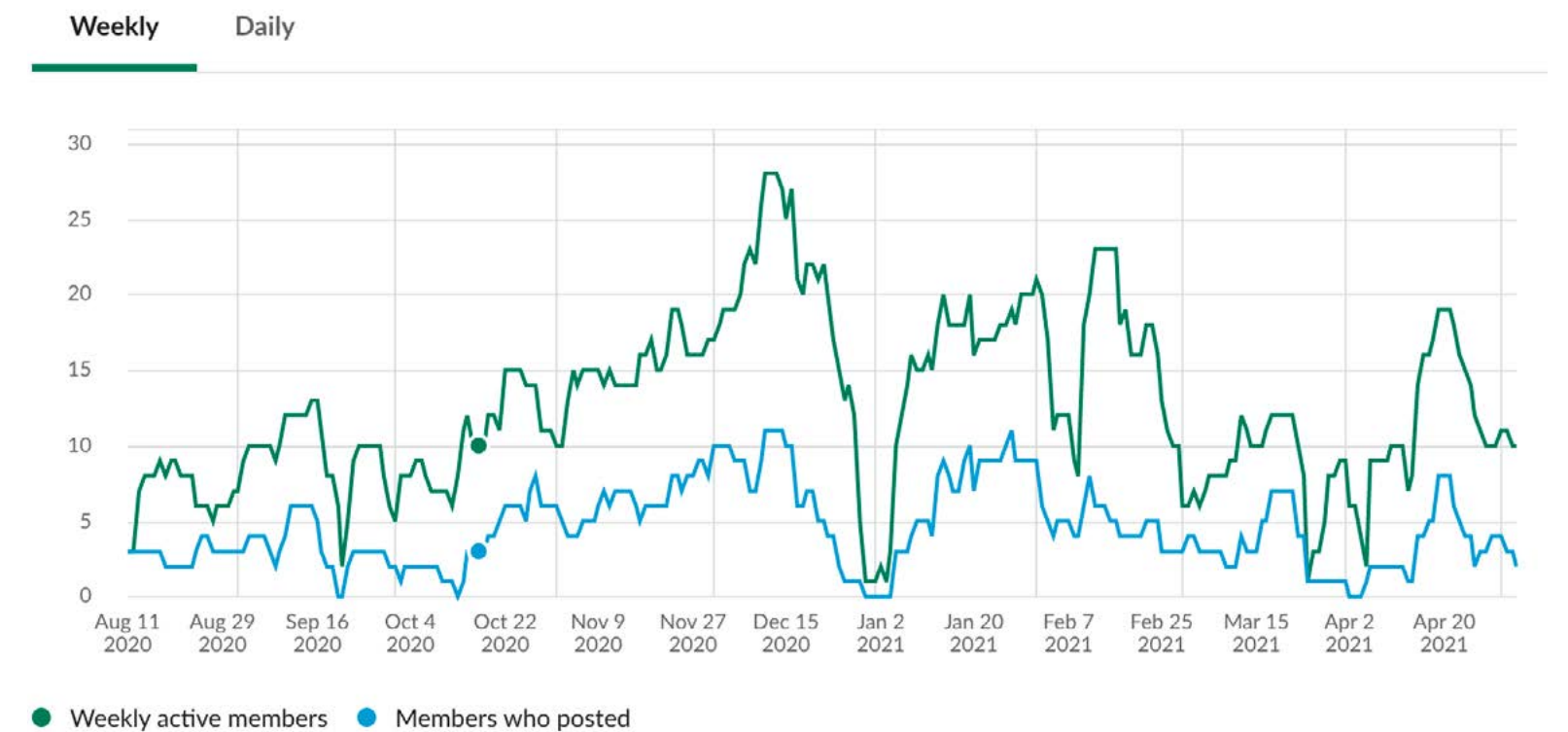# APPROACHES TO MOVING FORWARD

Transitioning L3 from the 18-month social innovation lab approach towards a longer-term network seeking to catalyse an ecosystem to enable social acquisitions at scale requires a shift in the way the work of the network is conducted. While the L3 network has identified and mobilized elements of an emerging social acquisition ecosystem the network's continued work requires a different model for the coordination of a broad array of activities moving forward, collective governance to ensure that the network can maintain a core narrative, and shared ownership of its activities by different members. To support this change in approach we have curated key concepts in knowledge and community mobilization and development to guide our efforts moving forward.

We turned to academic and applied literature to build on existing research to answer the following questions:

- What are the common needs and challenges of a collective group seeking solutions to a mutual problem?
- What do these types of groups or loose partnerships need to be successful? How might they be governed or organized?
- What does it mean to have diverse stakeholder groups with different frames of reference, ways of knowing, and motivations for participating?
- What makes for effective collective action?
- What are the lessons that are most appropriate for L3 moving forward?

Each work consulted and referenced helps answer the above questions, as well as deepen our understanding of the management and mobilization of resources that L3 has facilitated thus far. This understanding will then frame our recommendations for sustaining L3's built capacity post-project.

CONCEPTS AND KEY WORDS
This literature review casts a wide net over concepts that help contextualize L3's future community development. Concepts like *collective action*, *communities of practice* and *backbone organizations* provide a history of frameworks and processes that could inform future versions of L3. Terms like *inclusive management*, *knowledge governance*, *Ways of Knowing*, and related academic phrases examine the nuances of building collective understandings that allow for engaged, inclusive, participatory, and cross-sectoral action in the ways that the Legacy Leadership Lab's community has done so far.

Keywords: Ways of Knowing, knowledge governance, communities of practice, backbone organizations, inclusive management, inter-organizational partnerships, collective action, commons governance

Framing collective action communities

The L3 community formed around the Legacy Leadership Lab somewhat by design, but took its shape, direction, and focus much more spontaneously and emergently. The L3 team shifted its operational model several times in order to appropriately respond to and capture the most promising elements of the system that the Lab was examining and for which it was designing.

Original conceptions of the Lab envisioned that the end of the IRP-funded project would involve a transition of the community into a social acquisition-focused community of practice. Communities of practice require both a technical architecture (the tools that the members use to organize and communicate) and a social architecture (the roles, processes, approaches, and a predictable "rhythm" that sets expectations and gives the members of the community a sense of place). Most importantly, however, a community of practice requires a well-defined purpose tied to benefiting its members as well as its stakeholders.[1]

A community of practice is "a group of people who share a common concern, a set of problems, or interest in a topic and who come together to fulfil

both individual and group goals"[2] and may include such common assets as:

- Connections
- A shared context
- A space for dialogue
- A space for learning
- Collaborative processes
- Organizing capacity around key actions
- Knowledge generation, capture, and diffusion[3]

As L3 continued to grow its community, it did engage in all of the above elements to some degree. However, there were additional factors at work in both the community – which involves the "affect-laden social relationships and a substantial degree of shared ideational or cognitive communality … over a lengthy period of time"[4] and the practice – which involves a "mutual engagement, joint enterprise and a shared repertoire"[5] – that necessitated further action and investigation beyond what traditional communities of practice engage in. Some of the prototypes that were designed in the Design Stream or during the major design workshops, as well as the activities and meetings in the Activation Stream, engendered small, test-like communities of practice in their own right (e.g. non-debt financing, business advisors) that pursued specific areas of interest or community-building efforts in addition to the above behaviours and assets.

1   Cambridge et al., 2005

2   Cambridge et al., 2005, p.1
3   Cambridge et al., 2005
4   Lindkvist, 2005, p.1193
5   Lindkvist, 2005, p.1192

APPROACHES TO MOVING FORWARD

Social Innovation Labs

The primary differentiator between conventional conceptions of a community of practice and the direction that L3's community is taking is the community's genesis out of the social innovation lab process. As multi-stakeholder engagement and facilitation tool, the lab is meant to serve as an early-stage system intervention[6] rather than the long-term commitments and relationships within a community of practice. Described in the seminal Social Innovation Lab Guide, "[t]he Social Innovation Lab emphasizes not only imagining high potential interventions but also gaining system sight, redefining problems, and identifying opportunities in the broader context with the potential to tip systems in positive directions. It is a three-step process of developing, testing and instigating innovation strategies. It requires the right starting conditions, an investment in research and skilled facilitators."[7] The *complex systemic intervention* principles of the social innovation lab process mean that the L3 community is one that is rooted in:

- Overlapping problem and opportunity areas that deeply affect one another;
- High amounts of diversity in terms of who is at the table and why; and
- Principles of innovation and design targeted at having a collective impact.

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6   Westley & Laban, 2015
7   Westley & Laban, 2015, p.1

Ways of knowing and inclusive management

These roots begot a foundational role for L3 as the project progressed, chiefly, managing discussion, knowledge generation, and collaboration amongst many actors or coalitions, all with different ways of knowing. We can recognize the situation of successfully supporting this kind of community and reconciling their diverse approaches as *inclusive management*.[8] "Inclusive management builds "communities of participation" in which actors share information from their individual perspectives in order to achieve mutual comprehension and a broadly shared ambition for collective action"[9] This approach "emphasizes the active dimension of knowing a problem or the way [it is] experienced, investigated, and acted upon."[10]

This framing is applicable when considering the wide variety of interest groups that the social acquisition movement needs to include in order to be effective as a systemic solution for business retention, succession, and recovery. Many of the actors in social acquisition work have different reasons for approaching the work, different problems they hope to solve with the work, and have different opinions on what should be prioritized and acted upon. Governance challenges emerge out of this variety in perspective and ways

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8   Van Buuren, 2009, p.209
9   Van Buuren, 2009, p.209
10   Van Buuren, 2009, p.211

of knowing the social acquisition issue. Essentially, all parties are seeking management of the issue that incorporates certainty, consensus, and competence[11] (see text box for a deeper dive into these three "quests").

In policy work but also in the broader participatory work engendered in social innovation labs, inclusive management principles would recognize ambiguity - and in L3's case in particular, ambiguity is a common feature due to the emergent nature of social acquisition theory and practice - as "an opportunity for engaging the community of participation to find ways to move forward."[12] Knowledge governance in inclusive management is emergent and interactive rather than the more static constructs and codes of traditional management or governance principles.[13]

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11   Van Buuren, 2009, p.211
12   Feldman et al., 2009, p.128
13   Feldman et al., 2009, p.126

THE THREE QUESTS OF INCLUSIVE MANAGEMENT

In the *quest for certainty*, which addresses factual knowledge, different stakeholder groups will have different ways of approaching the problem: preferences in methods of knowledge production, research questions, and even in some cases which facts or concepts are relevant and which are not. Thus, certainty must be "constructed in a process of joint fact-finding, in which negotiated knowledge … is the ultimate goal, which can facilitate the discussion about ambitions."[14]

In the *quest for consensus*, how stakeholder groups interpret the problem, which facts are relevant or irrelevant, and the normative implications of the issue may differ, requiring that "consensus is reached on the definition of the problem and the interpretation and evaluation of factual knowledge."[15]

In the *quest for capacity*, groups' may consider different tasks and ambitions as more relevant or valuable than others, influencing how they determine "which competencies are [to be] acquired by actors, which relationships they develop and cherish, and which institutional arrangements they organize and maintain."[16]

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14   Van Buuren, 2009, p.212
15   Van Buuren, 2009, p.212
16   Van Buuren, 2009, p.213

APPROACHES TO MOVING FORWARD

Commons governance

The emergent system and community exploring the social acquisition solution requires a strong governance framework that will ensure its effective management and development overtime. Work by Elinor Ostrom suggests implementing the following core design principles within a governance structure seeking to manage a "common-pool resource" – a resource system that is essentially owned, managed, and accessible to everyone within it. The adjoining text box shares those principles.

Principles for governing a commons
- Clear group boundaries
- Rules regarding governance of commons are adapted to local conditions
- Those affected by the roles can participate in their modification
- Rule-making rights of organizations and communities within the building are respected by outside authorities
- Systems for monitoring member behaviours are created and enforced by members
- Graduated sanctions for rule violations
- Low-cost means for resolving conflict
- Nested systems of governance[17]

L3 has acted as the primary holder and generator of intervening action, both for the system of social acquisitions as well as its emergent community that has grown to self-organize and understand itself within the system. L3's unique positioning at the Waterloo Institute for Social Innovation and Resilience also positioned it as the natural holder and generator of the emergent knowledge around which groups could frame their understanding. For more on roles of the intervener in collective work, consult the adjoining text box.

17   Ostrom, 1990

THE EIGHT DIFFERENT ROLES OF AN INTERVENER IN COLLECTIVE WORK

Barbara Gray's analysis of partnership intervention is also largely applicable to the L3 community and knowledge management context. L3 has engaged in whole or in part with nearly every one of these eight roles.

Visioning: "recognizing the potential value of a collaborative alliance, imagining how the parties can collaborate, and conveying this vision to them."[18] This approach can reduce the unintentional turbulence caused by actors addressing a problem unilaterally, and instead encourages them to coordinate their efforts by integrating their knowledge of their domain and appreciating their interdependencies.[19]

Convening: "assess[ing] whether a partnership is feasible and ... identify[ing] and motivat[ing] potential partners to participate."[20] Convening involves not only recognizing the necessary stakeholders, but having the influence to bring those parties to the table. Conveners need "vision, legitimacy, and clout."[21]

Process design: distinguishes the content of a partnership from the way that it unfolds, with attention to the stages of the partnership, meetings, and patterns of interaction.[22] "Process designers can advise partners and encourage discussion among them about the principles governing representation within the partnership, expectations regarding participation, decision-making processes, ownership of and responsibility for outcomes, power sharing, and interactions with constituents, the media, and with the larger community in which the partnership is occurring."[23]

Reflective intervening: interveners seek "information about the alliance in concert with the partners."[24] Partners together evaluate their current and past interactions and decide on direction for change.

Problem structuring: "partners faced with a challenging problem attempt to dissect it, identify and compare possible solutions, and select the best one."[25] The approach to the problem can include merging the cognitive maps of the multiple partners to understand their perspectives on the components and intervention points that are relevant to their experiences, or it might involve ranking and quantifying the utility of available solutions.[26]

Conflict handling: conflicts can erupt in any partnerships but are more characteristic of larger, multi-party partnerships in which historical tensions between some players are carried over and need addressing before the partnership disintegrates. The intervener can act as a mediator that helps the conflicting parties redefine their conflict as cooperation toward a solution.[27] Parties must be willing to participate in collectively reframing their understanding and also must trust the impartiality of the intervener.

Brokering: handles information-sharing among partners, and brokers are usually themselves partners.[28] "The task involves ensuring that all relevant parties have opportunities to provide input and receive information about domain issues. In alliances with geographically remote partners, brokers may be their primary link to a larger network of organizations."[29] Gathering information is costly, and trusted social networks facilitated by brokers can mean reliable, trustworthy, and inexpensive information sources. As networks can also become unbalanced from a power perspective, brokers can play a role in decentralizing power or encourage power-sharing.[30]

Institutional entrepreneurship: "promoting the institutionalization of norms and agreements within an emerging field of organizational actors."[31] This approach is particularly relevant to emerging fields where norms, values, and processes are not yet established. An intervener must walk a fine line between over- and under-formalizing the new arrangements that emerge – too much formalizing will alienate some and lose the advantages of diversity, reducing partners' ability to learn from each other, while too little can quickly lead to decay and disbandment of the partnership.

18   Gray, 2008, p.668-670
19   Gray, 2008, p.670
20   Gray, 2008, p.671
21   Gray, 2008, p.671
22   Gray, 2008, p.676
23   Gray, 2008, p.676

24   Gray, 2008, p.674
25   Gray, 2008, p.673
26   Gray, 2008, p.673
27   Gray, 2008, p.678

28   Gray, 2008, p.680
29   Gray, 2008, p.680
30   Gray, 2008, 681
31   Gray, 2008, p.682

APPROACHES TO MOVING FORWARD

Ways of knowing

Most if not all of L3's events-based work was designed to shake up the boundaries between stakeholders and their particular *ways of knowing*, allowing them to then co-create new frames that become more than the sum of the previous perspectives. This kind of intervening is the kind that can be constructive toward the *collective action*[32] that is the focus of social innovation labs and L3 more specifically. The work done throughout L3 has moved the needle not only on building knowledge but teasing out a shared vision[33] that can then be managed and governed in ongoing participatory work. L3 recognized that it could encourage and stimulate essential knowledge work, and arrange for healthy preconditions for that work, but ultimately there is a deep need for the self-organization of the fact-finding, framing, and capacity work to be passed on and done by the participants of the issue being addressed[34] if inclusive knowledge management principles are prioritized.

Backbone organization

FSG and its various collaborators have done much work in articulating the concept of the *backbone organization*. It is a useful framework that we can understand L3 as having acted as for its adjoining community and the collective impact that social acquisitions are expected to provide for the small business and non-profit/for-purpose sectors.

Backbones provide
- a systemic perspective,
- a shared language,
- a future-facing focus,[35]
- the intangibles of collective impact,[36] such as leadership identification and development

to the collective work, and L3 has found these functions to be its most effective even while its mandate was to generate systemic innovation and design.

In addressing the continuity of social acquisition work, there is a strong opportunity to deepen the backbone role – whether that role is filled by the staff and leaders of the Legacy Leadership Lab, or an alternative emergent player who is best positioned for the role.

The opportunity is most evident when considering where L3 has *differed* from a characteristic backbone organization in the literature, namely in two significant ways:

1. Backbone organizations should work behind the scenes as much as possible to foster collective ownership of the effort – L3 has undoubtedly acted a visual and vocal leader in social acquisition work. It has, however, heavily prioritized the work that FSG highlights as essential for behind-the-scenes collective impact generation, such as "supporting the work of members, highlighting their successes, and authentically attributing or sharing credit with partners."[37]

2. Backbone organizations should not set the group's agenda – by virtue of its relationship with the Investment Readiness Program as the core funder of its work, L3 has prioritized work that lends itself to achieving the goals of the Investment Readiness Program while also capturing and including emergent and divergent initiatives and efforts that relate to social acquisitions more broadly. Going forward, and by leaning into participatory processes like the one outlined in Section 10, we hope to integrate that emergence more fully to truly reflect the evolving needs of the community.[38]

There are three other elements that FSG characterizes in backbone organizations that demonstrate the importance – once again – of running Section 10's participatory budgeting process, but also of pursuing Section 11's recommendations:

1. Backbone organizations should not drive or independently determine solutions.

2. Backbone organizations should not receive all of the funding.

3. Backbone organizations should not self-appoint.[39]

Ultimately, a backbone organization exists to ensure that solutions are designed around serving the needs of those that need them the most,[40] a commitment that L3 is wholly committed to as it pursues the financial and operational sustainability of the social acquisition movement. This holds most true at this pivotal moment of the L3 project: as the current 'acting' backbone organization of the community that has formed around social acquisition strategies, it is very possible that the best thing for the community's financial and operational sustainability is for its original leaders - the staff and researchers at the University of Waterloo's Waterloo Institute for Social Innovation and Resilience - to pass its role as backbone on to another organization or group of organizations.

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32   Van Buuren, 2009, p.215
33   Van Buuren, 2009, p.216
34   Van Buuren, 2009, p.232

35   FSG, n.d.
36   Turner et al., 2012

37   FSG, n.d., p.9
38   FSG, n.d., p.10

39   FSG, n.d., p.10
40   FSG, n.d., p.15

COMMUNITY ASSETS, COMMUNITY NEEDS

The following tables outline the assets that L3 has provided to the ecosystem during its run, as well as the gaps and needs of the ecosystem that were identified by L3 and the greater community.

▼ COMMUNITY ASSETS

Assets that were identified by the L3 Community

ASSET	CONTRIBUTING ACTIVITIES
Shared purpose of growing social acquisition practice	• Social innovation lab design and facilitation • Design group management and facilitation • Design workshop design, management and facilitation • Design support for Designers • Organizational leadership
Large, diverse interest groups invested in various elements of the social acquisition community or movement	• Community management • Activation group design and management
Collective understanding of concepts and language of social acquisitions	• Community events • Lab-produced knowledge product database curation and management
Internally generated/curated and crowd-sourced resource library to inform and reinforce social acquisition concepts, language, study and practice	• Social innovation lab design and facilitation • Lab-produced knowledge product database curation and management
Strong ties to ongoing social innovation research and practice	• WISIR-led research efforts

ASSET	CONTRIBUTING ACTIVITIES
Strong ties to federal social finance efforts	• Government of Canada - IRP funding • Design groups • Community management
Strong forward momentum and mutually reinforcing design efforts	• Social innovation lab design and facilitation • Design group management and facilitation • Design workshop design and facilitation • Design support for Designers
Technological and organizational infrastructure to hold and drive the community and its development and vision	• Organizational leadership
Established brand and communication channels for ongoing community development and advocacy	• Organizational leadership

▼ COMMUNITY NEEDS

Needs that were identified by the L3 Community

COMMUNITY NEED	SUGGESTED CONTRIBUTING ACTIVITIES
Leadership beyond L3's first funded iteration	• Volunteer governance committee • Board and elections
Greater awareness Funding to continue systemic infrastructure, supports, and enabling projects for social acquisitions	• Grants • Sponsors • Holding organization
A strategy to increase participation, inclusion and benefiting of under-represented communities in social acquisition work and benefits	• Dedicated equity & inclusion staff member or board member • Equity & inclusion strategy session(s)

ECOSYSTEM GAPS

Gaps and needs of the ecosystem that were
identified by L3 and the greater community

GAP	SUGGESTED CONTRIBUTING ACTIVITIES
An enabling environment for social acquisitions	• Policy development • A professional development organization to develop materials and train social acquisition practitioners • Peer mentoring programs for social acquisition buyers and sellers • Established social acquisition processes with associated products, resources, and guides • A social acquisition buyer/seller database or matching program • A social acquisition incubator/accelerator • A trust or holding company to socially acquire and convert essential transitioning businesses
Greater awareness for potential business acquirers on social acquisitions from: • youth and startup sector • public sector • non-profit and charitable sector • non-profit and charitable sector • social economy and social finance sector • community and equity-seeking groups	• Dedicated education and resource development, curation, management, and delivery
Greater awareness for potential business vendors on social acquisitions	• Dedicated education and resource development, curation, management, and delivery
Greater awareness for business advisors on social acquisitions	• Dedicated education and resource development, curation, management, and delivery

GAP	SUGGESTED CONTRIBUTING ACTIVITIES
Greater presence of social acquisitions in post-secondary education	• Dedicated academic research into social acquisition cases and process • A business school/academic course on social acquisitions
More products and services to deliver to social sellers and acquirers	• Social innovation design to build more products, services, programs, pilots, and prototypes to enable social acquisitions • A professional development organization to develop materials and train social acquisition practitioners • Peer mentoring programs for social acquisition buyers and sellers • Established social acquisition processes with associated products, resources, and guides • A social acquisition buyer/seller database or matching program • A social acquisition incubator/accelerator
Financing for social acquisitions	• A dedicated fund or granting or investing body to finance social acquirers • Loans or grants to defray professional support for social acquisitions • A trust or holding company to socially acquire and convert essential transitioning businesses
A support system for social acquirers	• A social acquisition candidate search fund • A professional development organization to develop materials and train social acquisition practitioners • Peer mentoring programs for social acquisition buyers and sellers • Established social acquisition processes with associated products, resources, and guides

PARTICIPATORY BUDGETING SURVEY & RESULTS

While WISIR staff have had one-on-one and small group consultations with key stakeholders in the network to address specific elements in each of these questions, the core element of our consultation with the L3 network was the launch of a participatory budgeting process. Participatory budgeting is a process that allows people to directly control a shared budget. Initially it emerged in Porto Alegre, Brazil in 1989 and has since been adopted by over 1,700 local governments in more than 40 countries.41 While participatory budgets have primarily been used to set budgets for local governments, the benefits that these processes have been found to generate are also ones that would benefit a member-driven network like L3. This process shifted the generation and prioritization of network activities from WISIR's staff to the broader L3 network.

Expected benefits from Participatory Budgeting
- Increased community engagement
- Education of government processes
- Improved accountability and trust
- Increased effectiveness and engagement
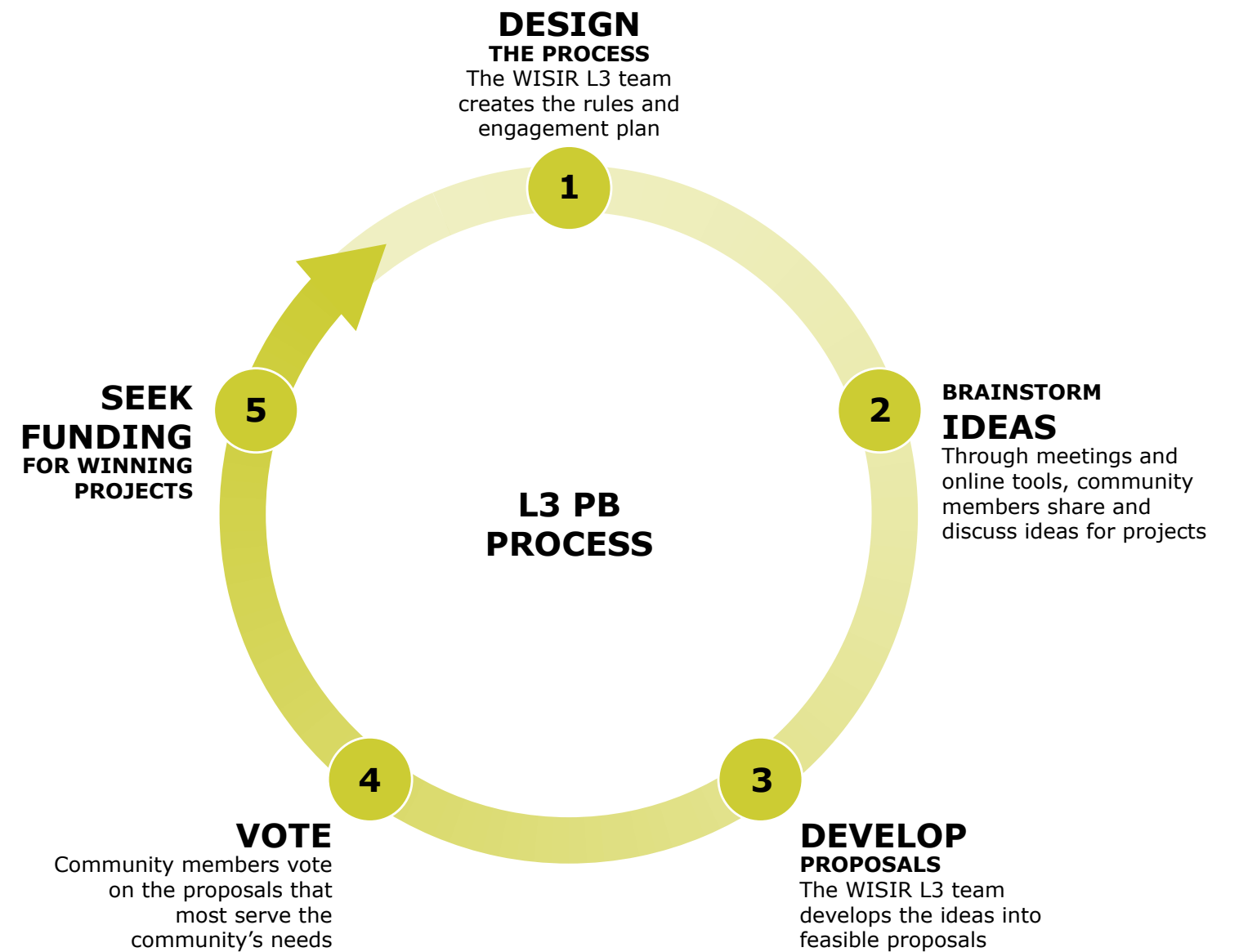- Promotion of cooperation and social justice

The Participatory Budgeting Project models a five-stage process for implementing a participatory budgeting project of designing the process, brainstorming ideas, developing proposals, voting, and funding winning projects. With the broad L3 network we have moved through the first four

of these phases. The process we undertook was designed by the L3 team in December and launched in January, giving our network opportunities to brainstorm ideas for the network to pursue in January and February, including dedicated time at our January and February L3 Community Events for idea brainstorming activities that engaged had a total of 54 attendees. In late February these ideas were then further developed into short proposals which our community then voted on over a two-and-a-half week period in March to set community priorities (see Appendix B for the survey distributed to the community).

The survey was released to a total of 583 people in our entire community and contact list, of whom 82 responded for a total response rate of 14%. Of those contacted, 159 were identified as key community stakeholders who had been actively engaged with L3 over the course of the project and therefore were seen as having a particular interest in and knowledge of the network's activities. If these key community stakeholders 50, or 31% of the key community stakeholders contacted, provided responses. Taken together WISIR is encouraged by the level of engagement of our network in setting priorities.

An overview of our PB process

DESIGN
THE PROCESS
The WISIR L3 team creates the rules and engagement plan

1

BRAINSTORM
IDEAS
Through meetings and online tools, community members share and discuss ideas for projects

2

L3 PB PROCESS

DEVELOP
PROPOSALS
The WISIR L3 team develops the ideas into feasible proposals

3

VOTE
Community members vote on the proposals that most serve the community's needs

4

SEEK FUNDING
FOR WINNING PROJECTS

5

PARTICIPATORY BUDGETING SURVEY & RESULTS P.2

Unlike a traditional participatory budgeting process the approach taken here was undertaken without a pre-determined budget amount and consequently the funding of winning projects is being taken as a strategic direction for future work. Were the project to receive carte blanche funding for its continuity then it could likely align quite closely with the priorities set by the community though this process. However, further funding and fundraising will come from a variety of sources which will in turn mean responding to the specific requirements, restrictions, and benefits that come from each of those funding sources. That being noted, the results of this process have provided a clear direction as to what L3 activities people in the network have seen produce the most impact.

Overall the direction from the community is that they would like L3 to continue its role as a convener, curator, and developer of resources to support the social acquisition ecosystem. At its core the role L3 has played in holding the information that has already been developed and continuing to support peer-led processes is seen as the baseline for continuing the community's growth and development. Additional resourcing should go towards deepening applied research and relationships between key institutional partners to continue advancing the work of the network. Beyond this work, additional resources would go towards initiatives that probe compelling parts of the Canadian economy to make a more focused case for social acquisitions through research

supporting the business case for social acquisitions, direct outreach to targeted stakeholder groups, and ultimately direct support for experimental approaches to social acquisition.

The delivery of such programming at different levels of network-resourcing is a more complex matter. Core activities at relatively low levels of funding are heavily oriented towards research, dissemination, and network-building activities. As the university-based institute that has stewarded L3 to this point, WISIR has capacities that are well-suited to coordinate research-oriented elements of this activity, though academic partners outside WISIR are well-placed for collaborating on or housing much of this work long-term. WISIR is also well-placed for network management and mobilization activities of L3 in the short-term, though shifting the governance and delivery of these services to a long-term home that is outside WISIR would likely leverage the work of the broader network more effectively than a permanent home within WISIR. At higher levels of funding more of the work is about targeted outreach and direct support of social acquisition activity and while WISIR would continue to be a valuable research, evaluation, and dissemination partner in this work more of this activity would fall to the broader L3 network. Taken together, the range of activities prioritized by the L3 network coupled with the capacities offered by WISIR and other L3 network members suggests a more complex continuity strategy over an extension of L3 as is.

OVERALL L3 NETWORK DESCRIPTION	BUDGET	NEW ACTIVITIES FUNDED AT THIS LEVEL
Curating social acquisition resources and communities of practice	$50,000	• Social acquisition website • Ongoing peer support
Curation and development of social acquisition research alongside developing a social acquisition ecosystem backbone	$125,000	• Solidify Partnerships • Interactive system & resource maps • Case Teaching Development
Social acquisition ecosystem backbone with directed outreach and coordinated research plan	$250,000	• Coordinate with municipalities • Coordinate with unions • Research Reports on Social Acquisitions • In-person Post-Pandemic Symposium

LEGACY LEADERSHIP LAB CONTINUITY RECOMMENDATIONS

There are five core recommendations about the work of L3 as we move forward from the 18-month period starting its work with IRP funding:

1 TRANSITION TO A NETWORK

Continue the essential work of L3 and transition the bulk of its work from WISIR to members of the L3 network. There has been value created in catalysing a social acquisition ecosystem and buy-in from actors across the network in maintaining and advancing the network.

2 COORDINATE RESEARCH

Focus the role of WISIR on research coordination, further developing teaching and dissemination strategies in partnership with academic and applied partners. Social acquisitions are still rare, so the community still needs support to build the business case for them, develop practices to enable them, and share learning to build the capacity to conduct more of them.

3 ALIGN ACTION

Expand social acquisition ecosystem-activities within and outside the L3 network, with L3 continuing to broker relationships and share learning. There are still substantial gaps in the ecosystem and the efforts of organizations representing a variety of skill sets, economic sectors, and geographies will have to be coordinated to provide the depth of coverage needed to enable more social acquisitions.

4 INCUBATE A BACKBONE ORGANIZA-TION

Incubate a coordinating body with a shared governance structure within WISIR with the goal of transitioning to a shared governance and ownership model for social acquisition ecosystem activity. A touch point will still be needed for the short- and medium-term to coordinate activities and broker relationships, though the exact structure of such an organization will still need further development so incubating it under an existing institution such as WISIR will help provide the network with some stability while the backbone organization is being established.

5 SCALE IN-LINE WITH RESOURCING

Scale the range of activities offered by the backbone organization in-line with the resourcing available to support it, shifting from curation and sharing of learning towards direct engagement with new sectors and support of social acquisitions as the increased resources enable such activity. Financial, human, and infrastructural contributions to the L3 network are a strong sign of support for building the social acquisition ecosystem and the pace at which this ecosystem is built should ramp-up to the level of resourcing that supports the network.

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APPENDICES

Appendix A Critical Canadian ecosystem enablers and actors

<u>CoopConvert</u>
Lead organization(s): University of Toronto's Centre for Learning, Social Economy, & Work (CLSEW); Université de Sherbrooke's Institut de recherche et d'éducation pour les coopératives et les mutuelles (IRECUS); Co-operatives and Mutuals Canada (CMC).
Weblink: https://www.oise.utoronto.ca/clsew/Research/Conversion_to_Cooperatives_%28CoopConvert%29.html

The Conversion to Cooperatives Project (CoopConvert) aims to better understand business conversion to cooperatives (BCCs) as outlets for saving jobs, addressing business succession needs, and creating new cooperatives across Canada. It does so by creating knowledge, building capacity, and enhancing sustainable cross-sectoral networks that should be of interest to the cooperative movement, policy makers, retiring business owners, unions, local communities, and all working people in Canada and internationally. Ultimately, the CoopConvert Project aspires to grasp more fully the BCC model in Canada and to explore how BCCs could be more compelling for Canadian business owners, workers, policy makers, and communities.

<u>Business Legacies Initiative</u>
Lead organization(s): Scale Collaborative, Royals Roads University
Weblink: https://scalecollaborative.ca/businesslegacies/

Business Legacies Initiative is a research and innovation initiative exploring how to:

- address succession and transition challenges facing small business owners,
- support non-profits to explore business acquisition as a social enterprise strategy, and;
- ensure that essential goods, services and employment provided by local businesses remain in communities.

<u>Business Recovery, Stabilization, and Succession</u>
Lead organization(s): CCEDNET/RCDEC

Mandate to compile, test, and make freely available a collection of curated learning resources and tools for business owners, employees, advisors, and other community stakeholders in Atlantic Canada (especially rural) to explore co-operative and social enterprise conversion as positive options to preserve, stabilize, and democratize their local economies.

<u>Community Ownership Collaborative</u>
Lead organization(s): Inclusive Economy London & Region, Pillar Nonprofit, London Poverty Research Centre

The goal of the Community Ownership Collaborative of Southwestern Ontario is to facilitate the transition of businesses or components of those businesses to more inclusive ownership in the form of cooperatives and not-for-profit enterprises.

<u>Exit to Community</u>
Weblink: https://www.notion.so/E2C-Wiki-e49039a152e44dc4b323a0ddeb2f453e

CCEDNET/RCDEC
Weblink: https://ccednet-rcdec.ca/

The Canadian Community Economic Development Network (CCEDNet) is a national association of organizations and people throughout Canada committed to strengthening communities by creating economic opportunities that enhance social and environmental conditions.

Social Capital Partners
Weblink: https://www.socialcapitalpartners.ca/

SCP has partnered with a major institutional investor to finance Employee Stock Ownership Plan (ESOP) conversions. They are working on a variety of inclusive and sustainable small business projects to help the small business sector becoming more worker-owned and equitable.

Centre de transfert d'entreprise de Québec (CTEQ) - Programme de soutien à la reprise collective (PSRC)
Weblink: https://ctequebec.com/programmes/la-reprise-collective/

The PSRC aims to make professional services available to collective sellers and buyers in a collective recovery context. Financial assistance is provided in the form of a non-repayable contribution. CTEQ is the leading and provincially-funded service-provider of transitioning businesses in the province of Quebec.

Coopérative de développement régional du Québec (CDRQ)
Weblink: https://cdrq.coop/la-reprise-collective-dune-entreprise

CTEQ works closely with organizations like CDRQ to deliver transitional services to businesses within the province converting to co-operatives. CDRQ is the provincial leader for cooperatives in Québec, and their team of experts support the start-up and development of Quebecois cooperatives.

Coopéerative de développement régional - Acadie (CDR-Acadie)
Weblink: https://www.cdracadie.ca/

Similar to CDRQ, CDR-Acadie is the regional support provider for co-operatives in francophone Atlantic Canada. They are a fixture of co-operative conversion support in the Atlantic provinces and have run conversion projects of their own in past years (similar to the ACOA-funded CCEDNET project referenced above).

Introductory content

L3 Continuity and Participatory Budgeting Assessment

| View | Edit | Webform | Results | Clone content |

As the first period of the Investment Readiness Program, which includes funding for the Legacy Leadership Lab, comes to a close, there are many ways that L3's work of advancing social acquisitions for business recovery in Canada can continue – within or outside of WISIR.

We are now in the final stages of the participatory budgeting process and are looking for your help in determining what direction to take the efforts next! Your input will help shape the ecosystem's direction in the months and even years to come.

This survey contains 2 options: a short 1-minute form or a longer 10-minute form.

Important to note: this excercise is to help us understand what we should pursue funding for. There is not - yet! - any funding to allocate to these activities.

__Information and privacy:__ questions regarding the collection of information on this form can be directed to the __*form administrator*__*.*

Screening questions

First name * (required)

This is collected only to ensure we avoid duplicating data. Survey respondent identities will not be made public.

> Olivia

Last name * (required)

This is collected only to ensure we avoid duplicating data. Survey respondent identities will not be made public.

> Smith

Email * (required)

Collected in case we have clarifying or follow-up questions. This will not be distributed publicly.

> oliviasmith@email.ca

Survey form choice

> **Choose which survey to fill out.**
>
> We've co-created a list of essential activities to move these efforts forward with the community as well as determined broad categories of system-building activity based on the participatory budgeting work the community did in our January and February community events. In order to determine community priorities of what we should seek funding for, we've created two options for you to participate in the budgeting survey. If you have 10 or so minutes and would like to review and vote on the itemized activities with details and estimated costs, select the second bullet. If you only have a minute and just want to vote on the broad categories of activities, select the first bullet.

Would you like: * (required)

○ The single question high-level categorized survey, in which you vote on the importance of broad activity categories on a scale of 1 to 10. (~1 minute)

○ The long form itemized survey, in which you vote on the importance of individual continuity activities with associated estimated costs on a scale of 1 to 10. (~10 minutes)

Short form questionnaire

Rate activity categories * (required)

Based on your experiences working in the social acquisition ecosystem, or its related systems like social finance, the social economy, co-operatives, the not-for-profit sector, small business succession, and community and economic development, which broad categories of activity are most and least important to carry forward as Legacy Leadership Lab finishes its 18-month Investment Readiness Program-funded project?

Social acquisition training and professional development for intermediaries * (required)

Multi-institutional research efforts * (required)

Continuing Design Efforts * (required)

Continuing Community efforts * (required)

Efforts that engage with and directly support social acquisitions * (required)

Awareness and communication efforts * (required)

Long form questionnaire

Rate individual budget activities * (required)

Based on what you know and have learned about the social acquisition system and the community that has formed around it, please assign a value to each of these individual activities, 0 being totally unimportant, and 10 being absolutely essential for continuing to nurture and increase this capacity. The item descriptions are formatted as follows: "[Name of category] Name of item (estimated cost should

the item get funded): Description of item." This list of items was co-created with the assistance of community members, most of whom attended L3's January or February community events.

[Efforts that engage with and directly support social acquisitions] Lending organization or Community Development Fund for social acquisitions ($75,000):Creation of a non-profit lending organization or revolving fund to boost social acquisitions. * (required)

[Efforts that engage with and directly support social acquisitions] Funding to support social acquisitions or wholly subsidized professional social acquisition services (est. $75,000): Financing for businesses looking to hire support for social acquisitions or funds to pay for legal and accounting services and consultations, accounting services, business valuations, business plans. * (required)

[Social acquisition intermediaries training and professional development efforts] Ongoing professional development (est. $50,000): Continuous curriculum development curation and delivery on social acquisitions designed for service providers (advisors, lawyers, accountants, valuators, etc.) * (required)

[Multi-institutional research efforts] Research report on social acquisitions that articulates and quantifies the potential impact of the solution (est. $25,000): Report that would build upon Geobey & Ronson's 2018 report 'The Cooperative Conversion Option'. Would expand beyond cooperatives, look at national and regional impacts, and incorporate new data generated since the COVID-19 pandemic. * (required)

[Multi-institutional research efforts] In-person social acquisition symposium post pandemic (est. $25,000): Networking and co-design event inviting people from all sides of a social acquisition support sector. * (required)

[Efforts that engage with and directly support social acquisitions] Consortium of co-op, social enterprise and social acquisition services support (est. $50,000): Convening a sort of consortium of co-op, Social Enterprise and social acquisition teams to provide a range of business services support including accounting, legal, business development, etc. * (required)

[Awareness and communication efforts] Interactive system & resource maps (est. $25,000): A web tool that would build on our existing system maps, but make them more user-friendly and interactive. These maps could include links to different resources and support. Additional maps could be created as well, and supported for one year. * (required)

[Multi-institutional research efforts] Impact framework for acquired businesses (est. $30,000): Connect with Our Common Approach framework to build an impact assessment framework specifically tailored towards socially acquired business. * (required)

[Awareness and communication efforts] Social acquisition communication strategy and campaign (est. $75,000): Communication strategy and initial campaign to different target audiences to build awareness and excitement for social acquisitions. * (required)

[Continuing Design efforts] Design groups, brainstorming sessions, and workshops (est. $60,000): Facilitation and management of design groups working on specific opportunities and initiatives that build systemic support for social acquisitions; Workshops & brainstorming sessions to co-create a road map that defines outcomes, peer to peer support, prototypes to build. * (required)

[Awareness and communication efforts] Awareness & support for sectors impacted by COVID-19 (est. $30,000): Awareness and support efforts targeting specific sectors relevant to, and impacted by, COVID-19, like Personal Support Workers and long-term care. * (required)

[Multi-institutional research efforts] Teaching case development (est. $25,000): Support to write 10-15 cases. * (required)

[Awareness and communication efforts] Targeting decentralized grassroots mobilization (est. $60,000) Decentralized grassroots mobilization/activation chapters * (required)

[Multi-institutional research efforts] Graduate student direct consulting to SMEs identified by foundation partners or credit union partners (est. $50,000): Multidisciplinary groups of 2-3 assess/consult directly using partner credit union(s) and/or foundation(s) to identify opportunities. One-year funding to consult with one SME per month. * (required)

[Efforts that engage with and directly support social acquisitions] Identifying eligible SMEs ($75,000): Create and deliver a system to help identify SMEs eligible for social acquisitions. * (required)

[Social acquisition intermediaries training and professional development efforts] Ongoing peer support (est. $25,000): Infrastructure and ongoing maintenance of open peer support community for service providers (advisors, lawyers, accountants, valuators, etc.). * (required)

[Efforts that engage with and directly support social acquisitions] Funding for equity-seeking representative orgs to incorporate social acquisitions within their programming and mandates ($75,000): This might include organizations that represent and serve: Indigenous peoples; Canadians identifying as a visible minority; Canadians identifying as part of the LGBTQ+ community; Canadians identifying as women; Canadians identifying as a disabled person; Canadians returning from drug rehabilitation; Canadians returning from the prison system; Canadians returning from the military; New Canadians; Youth * (required)

[Awareness and communication efforts] Targeting municipalities (est. $30,000): Develop and deliver content to support involvement of municipalities, particularly on issues of youth engagement, retention and attraction. * (required)

[Multi-institutional research efforts] Data analysis, reporting (est. $75,000): Data capturing, deeper data analysis and reporting on social acquisitions, capturing metrics, methodologies. * (required)

[Efforts that engage with and directly support social acquisitions] Social acquisition clearing house, marketplace, or buyer/seller network (est. $50,000): Annual salary, benefits and expenses to support a part-time position and development costs. * (required)

[Awareness and communication efforts] Social acquisition website (est. $25,000): Interactive website that provides all relevant social acquisition info and makes the case for them. It could serve as a central part in a social acquisition campaign as well as a directory or resources, cases, etc. * (required)

[Continuing Community efforts] Solidify partnerships (est. $25,000): Encourage and solidify partnerships, facilitate roles and gather in-kind contributions/donations/funding/ grant-writing. * (required)

[Continuing Community efforts] Social acquisition Hub/Non-proft/Institute (est. $100,000): Annual salary, benefits and expenses to support dedicated Executive Director and begin creating revenue streams to fund further positions. * (required)

[Efforts that engage with and directly support social acquisitions] Co-op incubator (est. $75,000): Support and incentivize 'quick' training of more co-op developers / navigators especially in anglophone community and those with large older demographics. * (required)

[Continuing Community efforts] Continuing the L3 Community (est. $60,000): Clarify community goals: vision/mission/values establishment with clear community goals; Community events: continue running monthly online L3 Community Events for 1 year; Regular convening of the ecosystem/ community; Newsletter: Asynchronous updates. Monthly newsletter - case studies, what current members are working on, updates. Also involves maintaining the slack channel and pulling material from there for promotion; Intro to L3 webinars for new members to join at any point and clearly define what L3 is and does. * (required)

[Continuing Design efforts] Funding for social acquisition prototypes (est. $50,000): Support prototype development and testing of social acquisition-enabling products and services. * (required)

[Awareness and communication efforts] Targeting unions(est. $30,000): Connecting this space with unionization efforts * (required)

Long form closing question

Would your organization be interested in engaging in, leading, or funding any of these efforts?

The Legacy Leadership Lab is just one of many organizations working in this space. Your organization or organizations in your network might be best suited to take on leadership of one or many of the items that will advance social acquisitions. We'd love to hear your thoughts on who and how we should be pursuing resourcing for. If you have nothing to contribute, simply click submit.

Nothing to say? Just click submit.