



Conference Snapshot

On November 19, 2019, 114 participants gathered at CSED's 4th annual Unleashed Conference to network, learn and be inspired. This year's theme was ***balancing strategy and operations for growth and impact***. Conference participants represented the full spectrum of the social enterprise ecosystem with SE practitioners, funders and service providers in attendance.

The following is a brief summary of the conference program and includes the results of the table breakout "challenging sacred cows".

Keynote Presentation

Tonya Surman, CEO, Centre for Social Innovation

- Twitter: <https://twitter.com/tonyasurman>
- LinkedIn: <https://www.linkedin.com/in/tonya-surman-19859911/>

In a refreshingly honest presentation, Tonya shared her story of the tremendous growth and expansion of the Centre for Social Innovation (CSI), a co-working space, community and launchpad for people who are changing the world. With multiple locations in Toronto and a location in New York City, she discussed coming to terms with growth and scale, the dangers of getting enamoured with growth, profile and hype, and the importance of deepening engagement. She advised the audience not to get pushed off your mission by

the “you should-ers” and that you may jump over your “sweet spot” if you’re sucked into growth.

Panel Discussion: Balancing Strategy and Operations

Moderator

Michael Lachapelle, Founder & Principal Analyst, Innovation by Design

- Twitter: https://twitter.com/mike_lach
- LinkedIn: <https://www.linkedin.com/in/michaellachapelle>

Panelists

Ian Bingeman, Executive Director, Youth Ottawa

- Twitter: <https://twitter.com/ianbingeman>
- LinkedIn: <https://www.linkedin.com/in/ian-bingeman-93a15639>

Katie Miller, Managing Director, Impact Hub Ottawa

- Twitter: <https://twitter.com/millerkaties>
- LinkedIn: <https://www.linkedin.com/in/katie-miller-37361332/>

Richard Plummer, Executive Director, Causeway Work Centre

- Twitter: <https://twitter.com/causewaywork>
- LinkedIn: <https://www.linkedin.com/in/richplumsolutions>

The expert panel discussed how organizations can best achieve a balance between strategy and operations and recognize the critical tipping points by understanding the relationship between their focus, core value and culture.

Spotlight: Leaders who are Re-imagining the Sector and Charting New Frontiers

Marco Pagani, President & CEO, Ottawa Community Foundation

- Twitter: <https://twitter.com/ottcommfdn>
- LinkedIn: <https://www.linkedin.com/in/marco-pagani-117772144>

Tessa Hebb, Distinguished Research Fellow, Carleton University

- Twitter: <https://twitter.com/tessahebb>
- LinkedIn: <https://www.linkedin.com/in/tessa-hebb-07ba431b>

As the inaugural spotlight leader, Marco Pagani discussed the role of the Ottawa Community Foundation and its efforts to support social enterprises

creation as a way to diversify charitable sector revenue streams and increase social impact. He introduced the Social Enterprise Platform, a new initiative which when fully operational will bring additional resources and supports to the sector.

Table Breakouts: Challenging Sacred Cows

Facilitator

Michael Lachapelle, Founder & Principal Analyst, Innovation by Design

- Twitter: https://twitter.com/mike_lach
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Michael facilitated the table breakouts using TRIZ, a problem-solving philosophy, which believes that by representing a problem as a "contradiction", one can predict creative solutions to that problem. The results of the discussion are found on pages 5-7.

"Stop Counterproductive Activities and Behaviors to Make Space for Innovation"
<http://www.liberatingstructures.com/6-making-space-with-triz/>

Conference Showcase Exhibitors



Conference Sponsors

The conference would not have been possible without the generous support of the following sponsors:



We hope you enjoyed Unleashed 2019 and we look forward to welcoming you to next year's conference!

Summary of Table Breakout Discussion “Challenging Sacred Cows”

THE CHALLENGE

How do we go about building a social enterprise so dysfunctional the social impact doesn't matter and people don't care.

TIPS

To help guide the conversation:

- This is 'serious fun'
- We begin with a VERY unwanted result
- Each team selects a recorder for each round to capture the main points of the discussion, also one person who will report back to the whole group (could be the same person)
- Think of both your own organisation and other organisations you know or with which you have interacted

Bad Behaviours

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| <ul style="list-style-type: none"> • No metrics • Don't care about client needs • Rarely communicate • Conflicting messages • Top down decisions • No diverse funding • Overly bureaucratic • Lots of busywork • Fail to tell your story/let others tell it • Don't harness teams • Start with the weight of the problem, with the solution being an addendum • Don't listen • Don't let staff talk to leaders • No analysis and unconnected decisions • No revenue plan • Don't engage stakeholders • Rigid thinking, basic work schedules | <ul style="list-style-type: none"> • Run by power-hungry self promoters • No financial accounting • No shared purpose • Ignore internal values • No business plan • Partnerships lack visibility • Profit comes first • Don't ask or only ask for expert advice • Operate in a vacuum
-isolation/pods/silos • Every charitable cause plotted to SE • No research or data • Lack of accessibility • Constantly reinvent the wheel • No plans for professional development • Use funding for staff and leaders disproportionately • Don't walk the talk |
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THE PRESENT

What do we do today that resemble the things that will create the worst possible outcome.

TIPS

To help guide the conversation:

- This is 'serious fun'
- We are talking about behaviours done today, not is new or what could be done.
- Each team selects a recorder for each round to capture the main points of the discussion, also one person who will report back to the whole group (could be the same person)
- Look for similarities to behaviours you see in your organisation or in others you have witnessed

What Do We Do Today

<ul style="list-style-type: none"> • Lack of funding diversity • Overwhelming passion, sometimes blinding • Weak understanding of sector, information vacuum • Bad financial models, weak accounting • Poor stakeholder engagement • Too little or too many stories • Lack of skill development • Consulting for validations versus direction • Working in isolation • Falseness in funding • Impulsive decision making • Ego clouding mission • Focus on scarcity rather than opportunity • Adherence to tradition/habit rather than need • Lack of collaboration 	<ul style="list-style-type: none"> • No tools for data • Either no metrics or too many metrics • One person show/disconnect from staff • No time to think, assess and strategize • Fear to move forward, lack of staff encouragement • Lack of capacity/skills for planning • No sound business plan • Not collaborating in community, feels like we are competing • Strategy developed in vacuum • No understanding of roles • Emphasis on procedures versus opportunities • Top down decision making, limited staff and board participation • Often lack diversity • Prioritize jobs over impact • Lack of analytical thinking • Voluntelling
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THE FUTURE

What steps could we take to stop these unwanted behaviours or activities.

TIPS

To help guide the conversation:

- This is 'serious fun'
- Make the statements 'real' by beginning each one with "We will stop..."
- This is about stopping what we do today, not about creating new behaviours for the future
- Each team selects a recorder for each round to capture the main points of the discussion, also one person who will report back to the whole group (could be the same person)

We will stop

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| <ul style="list-style-type: none"> • Preventing people from doing what we hired them to do • Using siloed unsuccessful planning by being more engaged • Being victims • Putting off deep work • Working without a strategy by building time for strategic thinking • Being all isolated, by leveraging our teams • Moving forward until we evaluate and plan • Devaluing staff expertise/experience • Ignoring need for diversity | <ul style="list-style-type: none"> • Accepting what gets handed down, work with a purpose • Being poor communicators • Trying to do everything, focus on a few • Failing to plan and prioritize • Losing sight of our vision • Being stuck, be adaptable • Giving platitudes • Being bad at governance by being more democratic • Believing that diversity, positive culture, safe space, equity will self emerge |
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