

# Fostering Partnership

## Insights on prepping for pilot in a community development innovation project

### About this series:

In the midst of the unprecedented COVID-19 health crisis, the Caring Community Challenge was launched, asking the question: how can we look after each other better in the places where we are? This 4-part Social R&D Learning Series will offer insights on key learning moments on the journey. The Caring Community Challenge was facilitated using the UpSocial lab methodology developed in Barcelona, Spain.

## Process in brief

In March 2020, the Caring Community Challenge was launched, a collaboration between Balsam Foundation, Ontario Trillium Foundation, Unison Health and Community Services, UpSocial and UpSocial Canada: a MakeWay Foundation program.

The Challenge followed a 6-phase methodology that involves:

- convening stakeholders around an issue of interest
- developing a Key Research Question
- searching the world for innovations that have answered that question
- selecting the best placed innovations for testing in the local community
- piloting the chosen innovations
- looking to scale the outcomes if successful.

In June 2021, our Caring Community Cohort selected [Post Bellum](#) and [Link Generations](#) for testing in the community of Bathurst and Finch. Read more about our outcomes in the Challenge Report. Visit [OurNeighboursStories.ca](http://OurNeighboursStories.ca) or email [gcahill@upsocial.org](mailto:gcahill@upsocial.org)

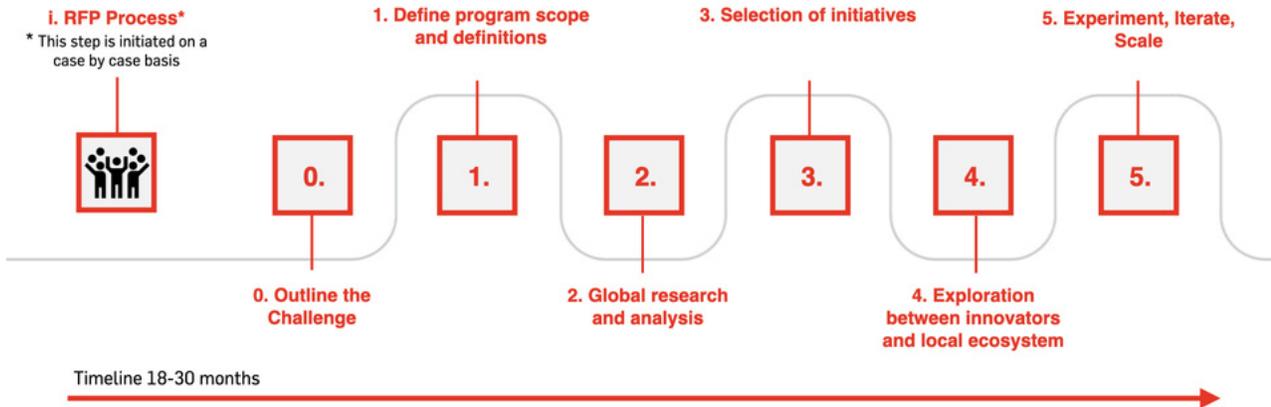
## Background

The Caring Community Challenge was launched as a collaboration between the Balsam Foundation, Ontario Trillium Foundation, UpSocial and UpSocial Canada - a MakeWay Foundation program. From the get-go, there was a tacit understanding of and a belief in the importance of partnership between all parties. What we couldn't know in advance was how many partners would join us along the way.

The UpSocial six-phase methodology (See diagram on next page) engages partners at each stage of the process, but there are particular points where examining the ecosystem for those not yet involved is necessary. And other points where identified partners can be differently deployed.

Following the initial launch of the Challenge, there was a need to find a community service co-host. We used a Request To Participate (our version of an RFP) to find this agency. (Read about the engagement of Unison in Article 1: Setting the Table) Once Unison Health and Community Services was onboarded, all partners involved at that point scanned the local community and the broader support ecosystem for additional partners to invite into the Challenge. The plan was to bring together local residents, local agencies and external subject matter experts and convene the cohort for the workshops and innovation selection to come. (Phase 0)

# UpSocial methodology



We recommend the drawing up of a Stakeholder Map Draft at this time (see: [What is Stakeholder Mapping? Definition, Guide, Tools & Matrix](#) and [Successful Stakeholders Mapping. How to classify potential donors in nonprofit organizations](#)). While not all of the invited partners joined the process, the outreach returned a very generous response, including further introductions to more stakeholders.

During Phase 1, alongside the development of the Key Research Question, the cohort engaged in a process of Asset Mapping (see: [A Guide to Community Asset Mapping](#)) so everyone involved could see the abundant resources in the local community and where relationships and future partnership might be possible.

In Phase 2 (Global Research), long-standing partnerships with UpSocial (Global) were particularly useful. Within a time-limited research period, UpSocial searches the world for innovative programs and services that have addressed the Key Research Question. Relationships with organizations like Ashoka, Skoll, Bloomberg and more are asked the research question to reveal any innovations in their networks that have successfully answered it through their work. A snowball-like approach that taps into these networks helps to make visible programs we would otherwise miss in a standard online search.

This partnership engagement happened alongside the outreach of the cohort members themselves who were also seeking programs for inclusion in the Challenge.

In Phase 3, 2-3 programs from the research are selected for testing in the pilot area. The cohort again is asked to examine their ecosystem for partners and resources thought useful to support the pilots in Phases 4 and 5. While partners and good relationships are critical throughout the Challenge process, the drawing together of partnerships for the pilots can mean the difference between an interesting experiment and the launch of an initiative that can produce outcomes at scale.

Engaging in the spirit of partnership with the chosen innovators in Phase 4&5 is a rich and rewarding experience. For Link Generations founder Dr. Lori Marks, the fact that her young program was found in the global search was amazing. The project staff from Post Bellum were equally excited to engage with Canada; a country with which they had yet to develop a connection. The approach to pilot development was very different with the two programs but the openness to experiment was very energizing.

Moving into the final phase also meant testing the strength and capacities of the partners to grow the programs beyond the pilot stage. Much has been learned about the partner's capacities during our pilots to inform future growth, which we will outline insofar as we can below.

From a facilitator's perspective, the engagement of partners at each stage of the Challenge process has reinforced the methodology's integrity and usefulness.

## Our learning

### Map Assets & Stakeholders Early

The development of asset and stakeholder maps during the early stages of cohort engagement meant we could see the resources available locally for program implementation, and identify gaps that could be filled externally. This was true, not just for the scaling end of the project, but during the pilot in the local community. The asset map also helps shine a light on community values - which is important to appreciate as new programming is considered.

### Capacity is a shifting variable

While many local residents and agencies were invited to test the pilot programs, it was also necessary to engage agency partners from outside the local community. The pilots required dedicated program staff to work alongside volunteers, and some of the smaller agencies in the cohort didn't have the capacity to deploy staff in this way. To ensure we could successfully pilot the programs and assess outcomes, we decided that as long as at least half of the pilot's elements were local, we could proceed with testing. For example, although the youth agencies we partnered with in the pilots were external, all seniors involved were local to the area. As both pilot programs were executed using Zoom, we also decided the outcomes returned would not be affected by the geographic distance between the participants.

### Assumptions will be tested at every turn

We tend to make predictions in processes like these, and for the Caring Community Challenge, almost none of them have been accurate.

When we started, many on the host team believed the programs selected for pilot would involve some element of urban design. The community of Bathurst and Finch has an above average number of seniors living alone in an above average number of high rise low rent towers. The built environment plays a huge role in how relationships develop and/or are impeded. However, while UpSocial and UpSocial Canada included many street level and tower-related urban engagement projects in the research stage, the cohort opted for more deliberative programming between generations. This direction impacted the partners downstream, scaling expectations and resourcing needs.

## What surprised us?

### Flexibility & Openness

Both Dr. Lori Marks from Link Generations and the team from Post Bellum were very helpful in ensuring the pilots could be deployed within a limited timeframe despite the obstacles presented by distance and the pandemic. Lori had already switched her program to Zoom delivery at the outbreak of COVID, so hosting from Maryland, USA was no obstacle.

On the Post Bellum side, while they have been running the "Our Neighbours' Stories" school-based program for many years - they were open to our adaptations. For example, their central motivation is to record the stories of people who have lived through experiences of political oppression, but they didn't require that of our pilot. They also didn't require us to test only in schools, which was a relief. Partnering with schools was desired and sought throughout the early stage of the Challenge, but it wasn't until very late in the pilot that one class decided to come on board. Instead, we predominantly tested with youth agencies.

## Unlikely partners make late entry

It was during an unrelated engagement that UpSocial Canada and Big Brothers Big Sisters (BBBS) Halton Hamilton were introduced, and BBBS was keen to get involved in the pilots. This was incredibly serendipitous. Not only were BBBS able to invite their youth to participate, they have since expressed interest in scaling out the program - a huge boost to Challenge confidence. With a less than ideal showing from schools and local youth agencies, our host team was concerned we wouldn't find a well resourced youth partner with scaling potential.

We were also contacted by Rahim Essabhai from the John Polanyi Collegiate Institute to join the Post Bellum pilot in its latter stages. Despite the timing, we scrambled to include them. Being able to include one classroom in the pilot helped us assess the program in a way that is much closer to its original design.

While it's not always advisable to point out specific partners over others, we couldn't do without the commitment, energy and capacity of Circle of Care, a not-for-profit home and community care provider in Toronto.

Circle of Care joined the cohort at the first invitation, then provided guidance and digital connectivity to seniors in the local community who wanted to participate in the pilots. They are now actively engaged in scaling the programs as well.

In this same spirit, we also want to acknowledge North York Community House (NYCH), who support new Canadians - youth, parents and seniors in becoming active, engaged citizens. NYCH invited their youth programs to the testing of Link Generations with considerable success. We equally could not have run the pilot without them.

*As the funder, we learned that neighbourhood-level projects matter deeply to the people who live there. We are considering investing more hyper-locally in the future.  
- Balsam Foundation*

## Mission Critical

### Relationships are everything

This has been a hugely generative and rewarding experience for most of the partners engaged from program inception to evaluation and planned scaling. When partners couldn't stay engaged due to under-resourcing, de-funding or staffing challenges, adjustments were made. However, the spirit of the project has remained positive throughout and in fact, has certainly resulted in lasting professional and personal relationships.

## What we let go

We let go of expectations over which partners would provide a runway to scale. While we do have some cohort partners involved in this last phase, we are also seeking new partners as well. We don't yet believe we have all the necessary stakeholders involved to grow both of the tested programs into a sustainable state, but we are actively pursuing them even as we wind down the formal facilitation of the Challenge.

Please read our final report on the [Challenge](#) for the outputs and outcomes of the pilots. If you see your organization in their ongoing success, reach out to co-facilitator, Geraldine Cahill at [gcahill@upsocial.org](mailto:gcahill@upsocial.org)

# About the authors

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Mandana Attar Zadeh is a community development expert, empowerment coach and social justice advocate. She is the founder of Flourishing Women Global. For over a decade, Mandana worked at Unison leading community engagement and neighbourhood improvement in the Bathurst-Finch region; initially designated a Priority Neighbourhood by the City of Toronto, it was later upgraded to an Emerging Neighbourhood. In her community development work, Mandana has been instrumental in fostering numerous community-building initiatives, including establishing and coordinating mixed resident/Agency networks. She has facilitated and supported the establishment of various resident-led groups and associations as well. More at: [www.theflourishingwomen.com](http://www.theflourishingwomen.com)

## Geraldine Cahill

Geraldine Cahill is Director of UpSocial Canada, facilitating multi-stakeholder, action-oriented social projects designed to address complex problems. Prior to launching UpSocial Canada, Geraldine was deeply immersed in the Canadian social innovation community, supporting the development of programs, policies and an enabling environment for enterprises and initiatives with Social Innovation Generation. In 2017 she co-authored Social Innovation Generation: Fostering a Canadian Ecosystem for Systems Change. Geraldine currently serves on the Advisory Board of Liisbeth MX and on the Jane's Walk Steering Committee. More at: [www.geraldinecahill.com](http://www.geraldinecahill.com)