

BOOSTING  
COLLABORATIVE  
IMPACT THE MOMENTUM  
FOR SOCIAL  
INNOVATION



COMPARTAMOS CON COLOMBIA





**BOOSTING**  
**COLLABORATIVE**  
**IMPACT** THE MOMENTUM  
**FOR SOCIAL**  
**INNOVATION**





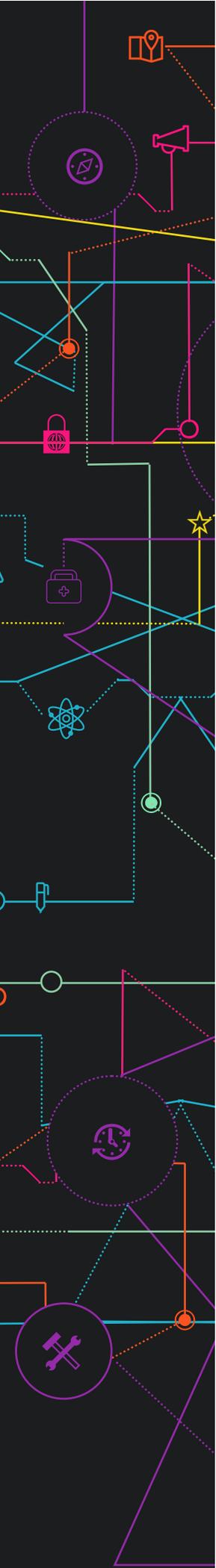
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# FOREWORD

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**M**ost of the world's challenges in terms of poverty and sustainability are concentrated in the Global South, making it a natural niche for the efforts of social innovators. Despite this, the conversation around social innovation continues to be concentrated in hubs within developed countries. Using innovation as a vehicle to accelerate positive, disruptive, and transformative change is a challenge that must include different voices and break down existing boundaries.

Aware of this, the Multilateral Investment Fund of the Inter-American Development Bank, The Rockefeller Foundation, and Compartamos con Colombia organized the first Global Summit on Social Innovation in Bogotá, Colombia in March 2017 and invited world leaders in the field to join an effort to build engagement and a network among organizations to grow social innovation in Africa, Asia, and Latin America and the Caribbean (LAC).

During the Global Summit on Social Innovation, 120 leaders joined a conversation on the present

and the future of social innovation in the most vulnerable regions of the world. At the same time, 42 of them participated in focus groups, surveys, and interviews that gave rise to the ideas, conclusions, and proposals presented in this document. The following text is an invitation to work together, to share, and to continue a conversation in which more people can participate, not only as beneficiaries but also as creators of the solutions that lead to solving the greatest challenges of this generation.

This research project was inspired by the hundreds of organizations that are seeking to create a positive impact in the lives of poor and vulnerable people through the use of innovation. This document is directed to Non Governmental Organizations, funders, accelerators, governments, labs, incubators, entrepreneurs, and other organizations within the social innovation field, and aims to convene these diverse actors around a common objective: achieving greater social impact.

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Multilateral Investment Fund, Rockefeller Foundation and Compartamos con Colombia.

# EXECUTIVE SUMMARY

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**The social innovation field encompasses all the individuals and organizations seeking to create positive impact using innovation as a vehicle for disruptive and sustainable change. Over the last 20 years, the field has witnessed exponential growth, with new actors and organizations willing to embrace the use of innovative techniques for the creation of social change.**

The attention generated by social innovation has increased the need to measure its effectiveness and evaluate the challenges ahead. The following research is an effort to assess the field from a global perspective, with a particular focus on civil society-led organizations and networks in the Global South. It is also an attempt to go beyond the individual organizations and cases, and identify common challenges and opportunities, to then propose a path to move forward as a collective.

In analyzing the context, we identify a key sustainability challenge caused by the lack of evidence on how social innovation initiatives are moving the needle on the complex issues they aim to tackle. Moreover, through our study of a sample of Social Innovation Organizations (SIOs), we identified how this challenge stems from the difficulties in acting collectively—sharing knowledge, scaling, and collaborating effectively. While social innovators share an interest in creating impact for impoverished and vulnerable communities, the barriers to collective action often limit their capacity to showcase substantial and systematic change. Given this challenge, we explored ongoing efforts to trigger collective action and, in particular, efforts to build networks

within the field. Our analysis showed that despite notable achievements, the extent to which this approach has resulted in effective collaboration is still limited, and thus, requires a boost.

Through this exploration, we identified that some of the most successful cases of collective action for social change come from social movements. Therefore, we embarked on an assessment of the success factors of social movements that the social innovation field can apply to engage in more effective collective action.

Despite the fact that social innovation is not a movement in the traditional activist sense, it can certainly implement several practices used by social movements in their quest for sustained social change. In particular, we identified three aspects with the potential of boosting collective impact in the social innovation field 1) the consolidation of a shared identity 2) the creation of a common agenda 3) the facilitation of effective collaborative work.

Finally, we studied how each of these elements could be applied to the social innovation field and present recommendations for SIOs to develop a sense of community, to define a set of common goals, and to create tools to help organizations that attended the 2017 Social Innovation Summit in Colombia develop a network to foster collaboration across the globe, enhancing their impact in the Global South.

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<sup>1</sup> Throughout this document, the term Social Innovation Organizations and its acronym, SIOs, will be used indistinctively, referring to the entities that design, promote, implement and/or test novel solutions to solve social problems.



# ABOUT US

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**The Multilateral Investment Fund (MIF)** serves as an Inter-American Development Bank Group (IDBG) innovation laboratory to promote development through the private sector by identifying, supporting, testing, and piloting new solutions to development challenges and seeking to create opportunities for poor and vulnerable populations in the LAC region. To fulfill its role, the MIF engages and inspires the private sector and works with the public sector when needed.

**The Rockefeller Foundation** promotes the well-being of humanity throughout the world. Today, Rockefeller pursues its mission through dual goals: advancing inclusive economies that expand opportunities for more broadly shared prosperity, and building resilience by helping people, communities, and institutions prepare for, withstand, and emerge stronger from acute shocks and chronic stresses.

**Compartamos con Colombia** is a non-profit operating in Colombia and seeking to use the knowledge, best practices, and volunteer work of firms within the private sector to leverage capacities within the social sector. Compartamos con Colombia contributes to the construction of a more inclusive and equitable country through the creation of sustainable, innovative, and efficient models applicable to the social sector.

# INTRODUCTION

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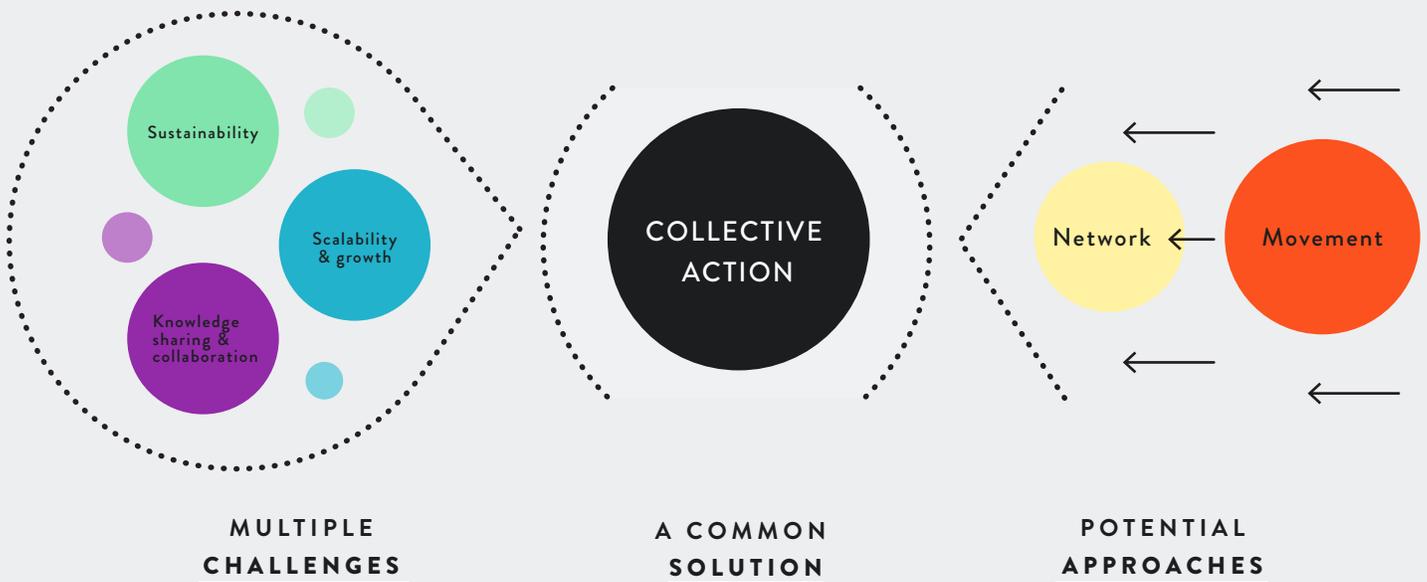
**In March 2017, the city of Bogotá, Colombia, was home to the first Global Summit on Social Innovation. The event, hosted by The Rockefeller Foundation, the Multilateral Investment Fund of the Inter-American Development Bank Group and its local partner, Compartamos con Colombia, convened more than 65 Social Innovation Organizations from 5 continents.**

Taking advantage of this unique opportunity, the hosts of the event commissioned *Movilizadorio*—a civic engagement and social innovation lab for Latin America incubated by Purpose—to carry out research aimed at understanding the challenges that SIOs face today and, based on evidence, propose new ways to address them. To develop this research, they also identified a sample of 42 SIOs that were the focus and source of information during the project.

The resulting document is not only a compendium of knowledge contained in other relevant literature dedicated to the areas of social innovation and social movements; it is, above all, a valuable resource that gathers lessons learned by practitioners themselves throughout their experience. In this sense, the participation of over 42 SIOs in various surveys, focus groups, interviews, workshops, and forums was crucial for the advancement of this research. We want to thank the kindness and generosity of all the organizations that agreed to share their work, lessons, and ideas with the understanding that together, they can achieve greater impact.

The document has two parts. Part A presents a landscape analysis of the social innovation ecosystem and an overview of the main challenges faced by the group of SIOs participating in this study. According to our research, **the social innovation field has proven successful in developing a new way of thinking, as well as innovative methodologies for tackling social problems.** It has also served as a vehicle to mobilize diverse stakeholders and to build partnerships between them.

**However, there is still little clarity on how the social innovation field is contributing to the creation of solutions to the problems it wants to solve. Challenges such as the sustainability of innovation projects and organizations, the scalability of solutions, and the lack of impact evaluation and knowledge sharing are particularly relevant in this regard. These challenges, we argue, have critical importance, as they can become a threat to the relevance of social innovation efforts beyond niche initiatives. All of these challenges also have in common the fact that they cannot be solved by an individual organization; the field has to address them as a collective.**



Most of the challenges identified in part A have in common the fact that they cannot be solved by an individual organization. Therefore, in part B, building on the intention of the partner organizations to develop a network, we build on the best practices learned from social movements to endow this group of organizations with the ability to grow their collective impact. We suggest building from the successes achieved by existing networks, but also embracing lessons and practices learned from social movements.

Part B explores the existing efforts to engage in collective action, in particular, the achievements and opportunities of existing networks. Later on, it analyzes the possibilities of learning from the success factors that social movements apply to spark collective action. Leveraging Purpose’s experience with movement-building, we then propose three critical areas for triggering collective action in social innovation: 1) the consolidation of a shared identity 2) the creation of a common agenda 3) the reinforcement of the collaborative work.

For the creation of a shared identity, we discuss two approaches used by social movements: 1) developing a common language and 2) developing an emotional bond. After analyzing the two possibilities, we conclude that although both are critical, given the existing limitations for defining the theoretical boundaries of the social innovation field, there is greater potential for the creation of

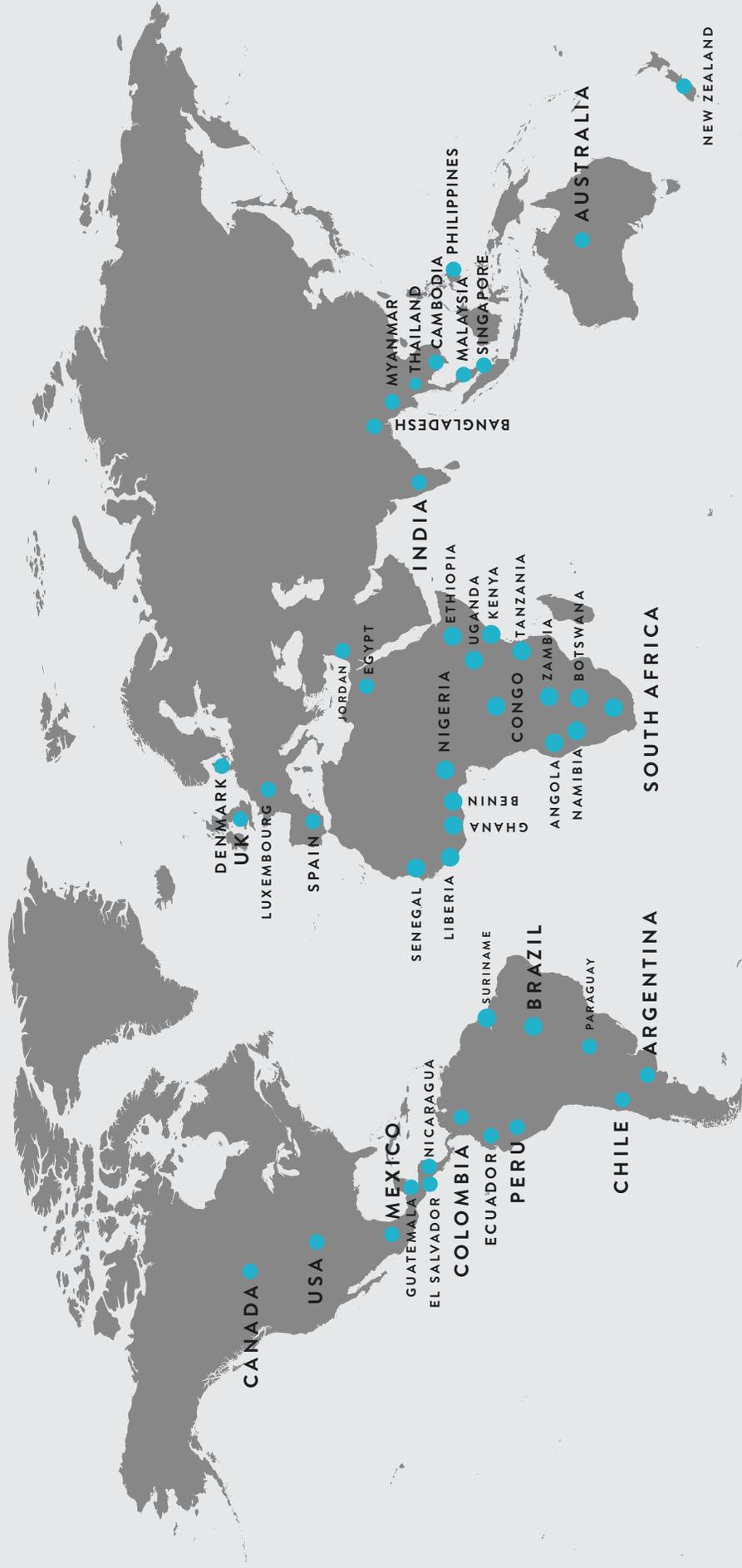
a shared identity based on ethos and an emotional bond.

For the creation of a common agenda, we identified the need to find thematic areas and specific goals around them—most likely around UN Sustainable Development Goals (SDGs)—and then work together in two main endeavors: scaling solutions and measuring impact.

Finally, our analysis of the necessary conditions to reinforce collaborative work led us to identify 1) who should participate in collective action efforts 2) how we can improve the interaction within organizations and 3) how we can incentivize participation. Through the exploration of these three elements, we arrive at a set of conclusions and calls to action aimed at allowing social innovators to continue creating social change through their passion, creativity, and hard work.

# ORGANIZATIONS OF THE GLOBAL SUMMIT ON SOCIAL INNOVATION

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# PART A

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IV.



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# SOCIAL INNOVATION LANDSCAPE OVERVIEW

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# SOCIAL INNOVATION LANDSCAPE OVERVIEW

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The field of social innovation is one of constant change and therefore it deserves a periodic and multidimensional analysis to better understand its current situation. These analyses are dynamic and can be pursued from a number of perspectives, including:

- The study of predetermined characteristics of SIOs themselves —their quantities, locations, areas of interest, problems that they aim to solve, etc.
- Analysis of the institutional backgrounds where SIOs operate —policies, legislation, funding and/or endorsement provided by national governments, academia, the private sector, and civil society.
- The assessment of concepts and methodologies commonly used, as well as the impact evaluations and reach produced via or by the innovations.

The many lenses through which social innovation can be analyzed, along with the diversity, growth, and fluidity of the field, make it hard to register and systematize its advancements and challenges in full. However, some specific efforts deserve to be thoroughly reviewed, given their value for better understanding the sector.

In this vein, some of the most systematic efforts to provide an account of the current state of the social innovation field include the Social Innovation Index developed by the Economist Intelligence Unit, which focuses on the institutional context in which SIOs operate. Another interesting exercise is the research led by the SI-Drive project, funded by the European Union, which has mapped organizations in the field and followed the evolution of the concepts and methodologies they use.

In order to contextualize the information contained in this document, as well as to validate its calls to action, we have reviewed these and other studies. Here we provide a general, yet not exhaustive overview of the current trends in the sector as identified by our literature review.



## THE FIELD

The last two decades have witnessed the emergence and flourishing of the social innovation sector<sup>2</sup>. **New organizations have been created in every corner of the world and with this boom, the number of projects, resources, stakeholders, and supporters of the use of innovation to solve complex social problems has also increased<sup>3</sup>.**

**Although Social Innovation Organizations exist all throughout the globe, those located in the Global North have clear advantages regarding access to funding and expertise.** Well-known SIOs such as the UK-based organization Nesta, the Canadian MaRS or the US-based IDEO.org, are good examples to illustrate this point.

While the range of issue areas for SIOs seems to be endless, **there is clear agreement on their interest to focus on deeply rooted and complex social problems affecting people on a global scale.** In fact, most of them focus their work on sustainable development and poverty alleviation.

**The capacity to establish relationships with multiple stakeholders is one of the most important characteristics of the social innovation field.** The most frequent partners of SIOs are the community, NGOs and nonprofits, private sector organizations, and public entities.

Sectors such as social entrepreneurship, design, technology, public policy, and cities and urban development are starting to show interest in social innovation as a means to fulfill their mission.



## THE INSTITUTIONAL BACKGROUND

The fact that the majority of Social Innovation Organizations are based in the Global North aligns with evidence that social innovation finds stronger institutional support in those same areas.

**According to the Economist's Social Innovation Index, the U.S. is a pioneer in the design and implementation of policies promoting social innovation and has established a robust institutional framework to support these efforts.**

The above-described actions are paired with sustained funding from the government, the private sector, and philanthropic sources. In this same vein, the United Kingdom, Canada, Belgium, and New Zealand take the top positions on the overall ranking. On the bottom end of the list are Nigeria, Bangladesh, Saudi Arabia, Paraguay, and the Philippines, where SIOs do not enjoy the "privileges" of its Global North peers.

**Regarding funding, Canada, the United States, Belgium, Denmark, and the United Kingdom continue to rank among the most generous countries to SIOs. These are relevant findings, considering that the most robust institutional and economic ground for social innovation is not in the countries where the problems that social innovation aims to solve are most acute.**

Some developing countries, such as Kenya, have made significant efforts to promote social innovation. According to the Social Innovation Index, Kenya excels in areas such as entrepreneurship and civil society capacity building.

<sup>2</sup> In a sample of 1005 cases studied by SI-Drive in 2015, 42% of the initiatives had started in the previous five years and 30% between 2006 and 2010.

<sup>3</sup> Howaldt, J. et al. (2016) "Mapping the World of Social Innovation: A Global Comparative Analysis across Sectors and World Regions". SI-DRIVE Report.



## THEORETICAL UNDERPINNINGS

The theorization around social innovation is as recent as the field itself. It comes from a myriad of fields including economics, public administration, design, psychology, and sociology. **Evidently, there is now a reliable body of knowledge around the concept, its methodologies, and approaches to social change. The available information, however, is scattered, and many times is presented in non-actionable ways.**

Some of the most researched topics in social innovation are focused on its methodological

approaches and particularly on how these methodologies allow empowering users and putting them at the center of the innovation process.

The main knowledge gaps in the field are related to how social innovation creates social change, particularly around how to measure the impact and the specific way in which social innovation initiatives can improve or affect its targeted audiences in a massive and sustained way.



## IMPACT GENERATED

**The social innovation field still lacks systematic approaches to measuring how it has been able to “move the needle” in its core issue areas.** According to our research, two elements hinder this effort. The first one is the diversity of the field, which makes it hard to analyze the total effect of the different approaches on a single cause. The second is the nature of the causes addressed, which are complex and cannot be easily solved by a single initiative or actor.

<sup>4</sup> The Economist Intelligence Unit (2016) “Old problems, new solutions: Measuring the capacity for social innovation across the world”.



# GETTING TO KNOW EACH OTHER

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INNOVATION

# GETTING TO KNOW EACH OTHER

The findings in this document are based on information gathered from 42 Social Innovation Organizations from 5 continents who specialize in a broad range of issues. The selected organizations attended the Global Summit on Social Innovation. They were chosen based on their expertise areas and geographic location, seeking to build a representative sample of sizes, regions, and issue areas.

## GENERAL OVERVIEW AN EXPANDING FIELD



The social innovation field is still relatively young but has been growing over the last 20 years. Indeed, most of the surveyed organizations were created in the late 90s and early 2000s.

This boom of the social innovation field is not only related to the number of organizations created, but also to their ability to secure major funding for projects: **28% of the surveyed organizations increased their annual budget between 2015 and 2016, 67% maintained their budget within the same range as the previous year, and only 5% faced a radical drop in their resources.**

Budget increases are proportional to the number of projects that Social Innovation Organizations

have been able to pursue each year. **In 2015, the surveyed organizations developed an average of 18 projects, while in 2016 that number increased to 24.**

In terms of geographical influence, most of the organizations in our survey have either a global or regional scope in their work; the structural and complex problems they aim to solve are difficult to frame and confine within geographical boundaries.

Most organizations deal with existing complex problems such as health, education, and sustainability, but are experimenting with new technological tools as potential means to solve those issues.

## LEGAL STRUCTURES AND GOVERNANCE MODELS

ALWAYS ADAPTING

# FLEXIBILITY

one of their greatest assets

The diversity and adaptability within the social innovation field is manifested in the myriad of legal and formal structures that these organizations are adopting.

In our sample, non-profit was the most common structure. However, more and more SIOs are choosing other kinds of legal structures (See Table 1, pg. 51), for example, as part of universities and research centers, as part of national and city governments, as parts of private companies, and as social enterprises.

**No matter the structure they choose, Social Innovation Organizations prioritize aspects such**

**as their flexibility, stability of funding, capacity to create impact, and access to networks and know-how when deciding their legal structure.**

Similarly, when choosing their governance models, they tend to value independence, access to expertise, transparency, and fundraising opportunities. Subsequently, SIOs tend to prefer independent governance structures such as advisory boards. This allows them to bring on board senior staff with the ability to hold the organization accountable and boost their fundraising skills.

**"We allow new ideas to grow by being flexible and agile."**

Senam Beheton, Etrilabs

## OPERATIONAL STRUCTURES

STAYING ALIVE

# SUSTAINABILITY

is a key challenge for **SIOs**.

**Most of the surveyed organizations considered that some of their greatest challenges towards sustainability are: 1) being able to find experienced, yet affordable talent 2) identifying the right services to offer and 3) identifying and selecting the best partners to better leverage their skills and resources for greater impact.**

Regarding human capital, SIOs manifested having a hard time finding and keeping highly specialized professionals. As their usual size ranges between five and ten staff members, losing one single person represents a staff shortage that can rapidly become a crisis. In such cases, the organization's adaptability and creativity come into play to consolidate a team that adds value to the work and is affordable for the projects.

**On the other hand, interviewed SIOs considered partnership-building as one of their greatest strengths.** Whether it is finding the right funding or the best implementing partners, Social

Innovation Organizations are experts in convening diverse stakeholders. However, this is certainly a costly and time-consuming activity, and therefore

SIOs prioritize those partnerships with the potential of becoming stable and long-term alliances.

“We map out the ecosystem, look for what is there and what is not there, and start to advocate for what is NOT there.”

————— Eva Kaplan, UNICEF Jordan

SIOs are savvy in defining their business models. However, being able to communicate their portfolio in attractive and efficient ways for funders and participating communities continues to be a major challenge. A similar situation occurs around the definition of a value proposition that is attainable and unique to the context.

Regarding funding sources, they continue to rely in large part on grants, donations, and service delivery to fund their operations. Given the limited amount of donors and philanthropic sources, SIOs are in constant competition, often hindering their cooperation efforts and their capacity to share and work collaboratively.

“We have all these amazing projects. But we have to start thinking from a financial sustainability perspective because, once the funding stops, what happens to those projects?”

————— Jonathan Chang, The Lien Centre for Social Innovation

## INNOVATION & KNOWLEDGE MANAGEMENT METHODOLOGIES

**DRIVEN**  
 **BY DESIGN**  
 **THINKING**  
**RESTRICTED**   
**BY COMPETITION**

One of the most distinctive features of social innovation is its broad set of methodologies. SIOs are constantly appropriating and using promising tools from different fields (See Table 2, pg. 52). Design thinking continues to be the most recognized tool, while others like behavioral sciences and data analytics are becoming more common.

Despite depending on the generation of knowledge for its advancement and success, SIOs often find it difficult to efficiently manage knowledge at an organizational level, to share knowledge outside their organizations, to measure the results of their work, and to evaluate its impact.

Paradoxically, although partnership building is among the nuclear values of social innovation, **sharing knowledge at an external level is still one of the most challenging issues.** When done, SIOs prefer to focus on exclusively sharing the information that can strengthen the organization's stand as a potential partner or funding recipient.

**"Failure is the thing that we should be learning about."**

Angus Donald Campbell, Design Society Development DESIS Lab, University of Johannesburg.

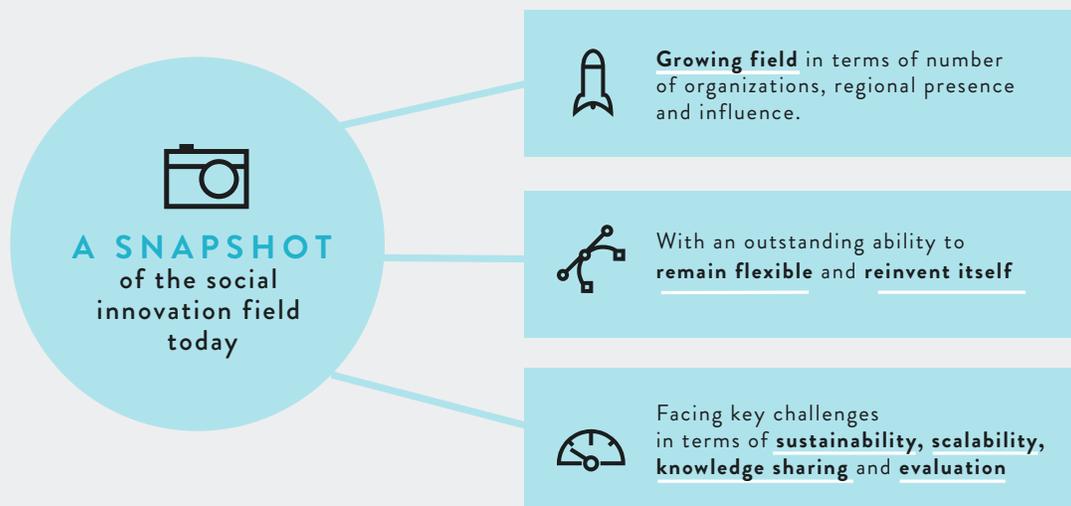
Moreover, competition for resources might be one of the reasons for not sharing valuable knowledge. Other reasons include the lack of know-how or resources to systematize and share.

In order to overcome the challenges of knowledge management processes, the surveyed organizations recommend setting the objectives and measurements of the project before it starts, establishing knowledge management systems and

mechanisms as an integral part of the project cycle, and assigning specific and independent staff for these tasks.

Currently, the most common approaches to measuring overall impact include the use of anecdotal evidence and the creation of evaluation systems that focus on the number of lives impacted and/or the type of innovations produced.

## WHAT CAN WE LEARN FROM THE CURRENT LANDSCAPE?



One of the greatest successes of social innovation is the capacity of the sector to quickly increment the number and quality of its partners, resources, models and methodologies to best fulfill the needs it aims to serve. SIOs have been proven successful in mobilizing multiple stakeholders, putting users at the center of the social challenges addressed, generating new ideas and creative models, and adopting methodologies from other fields for their work. However, SIOs need to urgently address the following challenges:



#### REMAINING ECONOMICALLY, SOCIALLY, AND POLITICALLY VIABLE:

Securing funding for the innovation process, which inherently involves failing, while showing results and responding to the expectations of its audience (communities, funders, governments, companies, academics, and believers in the added value of social innovation to solve social problems).



#### SCALING SOLUTIONS TO EFFECTIVELY MOVE THE NEEDLE ON KEY ISSUES:

Massively scaling solutions that work, while strengthening their operational structures to support the expansion (staff, operations, geographical reach, and thematic expertise).



#### COLLABORATING AND SHARING KNOWLEDGE TO OBTAIN BETTER RESULTS AS A COLLECTIVE:

Creating and maintaining the capacity to learn from their own successes and failures; measuring impact; developing the habit of information sharing and keeping track of the knowledge created.

These challenges have critical importance, as they can become a significant threat to the sustainability and relevance of social innovation efforts. Moreover, the complex and structural nature of the challenges identified implies that they cannot be solved by an individual organization. **The field has to address them as a collective, and this imposes a need for effective collaboration. In order to remain relevant, SIOs need to engage in effective collective action.**



## WHY COLLECTIVE ACTION?



**Remaining economically, socially and politically viable:** social innovation requires dedicated, sustained, and patient funding, but unlike other innovation-driven businesses such as the biotech or renewable energy, the field has to better frame and deliver the social impact returns that those funders and supporters are expecting. Careful impact measurement, breakthrough solutions and successful models that are massively adopted are much needed to achieve such a goal. Similarly, enhancing the need for adequate financial instruments and business models for the entire field is a project that requires coordinated advocacy processes. Again, the attention has to shift from the individual fundraising process to the collective relevance of the field.



**Scaling and growing to move the needle effectively:** The experience of all significant human endeavors such as space travel or the cure of deadly diseases demonstrates that getting to a breakthrough requires large-scale multi-sector coordination and cooperation. However, effective scaling is still one of the most absent activities of the field. The creation of isolated breakthroughs and niche success stories has yet to be followed by a massive adoption of successful models. Moreover, the efforts of moving the needle in areas such as poverty alleviation and access to basic services at a global level require coordination from the local level. Egos and individual gains need to be put aside to achieve demonstrable impact on collectively defined objectives, such as advancing the SDGs.



**Collaborating and sharing knowledge to obtain better results:** Currently, Social Innovation Organizations have been successful

in collaborating at a small scale within their trusted networks. However, the knowledge sharing process continues to be limited and designed to filter critical information such as failures and promising methods for success. Establishing greater collaboration and trust requires not only a few organizations taking the first step: it requires coordinated, massive demonstrations of willingness to share and to put individual interest aside to expand and enrich the field as a whole. In this vein, obtaining key knowledge that is relevant to all organizations, such as effective business models and evaluation systems, has the potential to benefit the entire field.

"In Socialab we believe that humanity has reached enough level of knowledge and consciousness to take responsibility for the great challenges of the future"

————— Lina Arango, Socialab

## CHALLENGES TO COLLECTIVE ACTION

According to our research, some of the barriers that are currently limiting the collective action necessary to tackle these challenges include:

The flexible and changing nature of the field makes it difficult to reach commonly accepted definitions and concepts.

- The continuous geographical and thematic expansion of the field makes it hard for organizations to keep track of and connect with what is happening in other parts of the world and within other thematic areas.
- The continuous emergence of new actors requires the construction of fast ways to connect and catch up with existent organizations.
- The fact that organizations are both potential partners and competitors for available funding creates a conflicting situation—often referred as

“coopetition”— which can hinder relationship-building.

Both funders and organizations are placing much of their attention on ideation and innovating, leaving implementation and scaling as a secondary priority.

Teams are small, and are focused on fundraising and delivering. There is not enough capacity and focus on knowledge management internally and between organizations.

## COLLECTIVE ACTION EFFORTS TODAY

Through our conversations, SIOs expressed a latent need for more and improved sharing. Their leaders are aware of the power of collective action and have built it into their DNA and theories of change. Such interest explains the initiatives around having a more articulated way of working. The approach to this problem has been one of network building and knowledge sharing. The efforts in this regard are countless (See Table 3, pg. 53), and speak to the relevance of collective action for SIOs.

The achievements of networks with a longstanding tradition in social innovation, such as SIX, ANDE, DESIS, Sistema B, and Afrilabs, are undeniable. While these efforts should be recognized and maintained, lessons coming from social movements can complement and strengthen the way in which collaborative work is developed.

### Our analysis identified that the existing networks have been successful at:

- Advancing the creation of a theoretical body of knowledge for the field.
- Sharing and training organizations in specific thematic areas.

- Creating niche, thematic, and regional working groups.
- Shifting the discourse and developing local innovation ecosystems.
- Crafting a creative and appealing narrative to frame social innovation efforts.
- Starting a conversation regarding the creation of shared agendas, visions, and values.
- Providing space for networking.
- Sharing success stories.
- Connecting potential partners.

### Some of the remaining challenges include:

- Measuring the impact of the field on tackling complex issues.
- Creating a unified umbrella under which all the networks and organizations can operate.
- Creating an inclusive space with low barriers for participation. (Some examples of existing barriers are membership fees, geographic dispersion, and stages of advancement).
- Effectively triggering collective action beyond the “usual suspects”.
- Sharing lessons learned from failure.
- Overcoming the “coopetition” phenomenon and enabling unrestricted cooperation.

### COLLECTIVE ACTION 3.0

Collective action has been recognized as a critical issue within the social innovation field and one with the potential to tackle some of its greatest challenges. This evidence led us to examine new possible approaches for attaining more effective and sustained collective action within the field.

When it comes to generating systemic and cultural changes in policy and human behavior at a massive scale, social movements are a key place to look for successful examples. Organized group actions have been effective in optimizing the use

of resources, accelerating and leading change, and coordinating towards long lasting impact. Social movements are at the forefront of the creation of the kind of mass cooperation and organized action that the social innovation field is lacking.

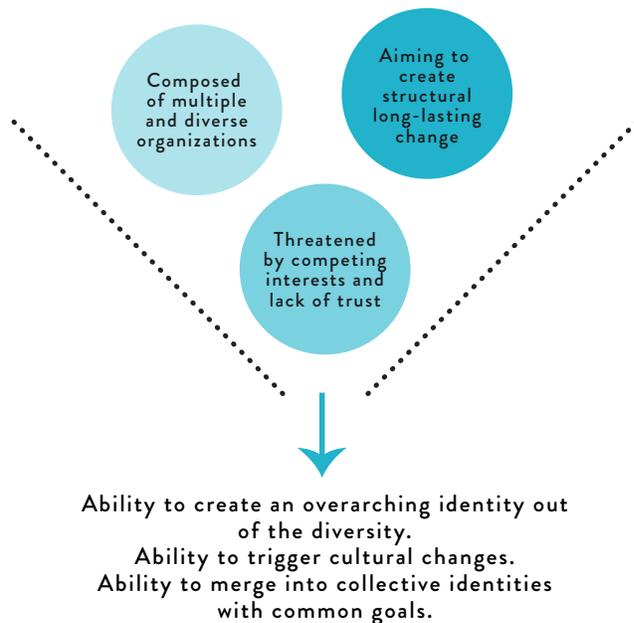
Moreover, both social movements and the organizations belonging to the social innovation field share elements that allows us to argue that an interchange of best practices between them is possible and relevant.

“Movements actually represent the scale of power required to win not just short-term things, but true, long-term, systemic change.”  
——— Jessy Tolkan, Purpose

With the aforementioned in mind, our working hypothesis on this project is that a) the social innovation field could address its current sustainability, scalability, and knowledge-sharing challenges through sustained collective action b) social movements have best practices for collective action that can be adopted by the social innovation field and c) absorbing the lessons learned from social movements can potentially boost collective action within the social innovation field, and contribute to solving its current challenges.

### WHAT MAKES THE SOCIAL INNOVATION FIELD

Comparable and subject to learning from social movements?





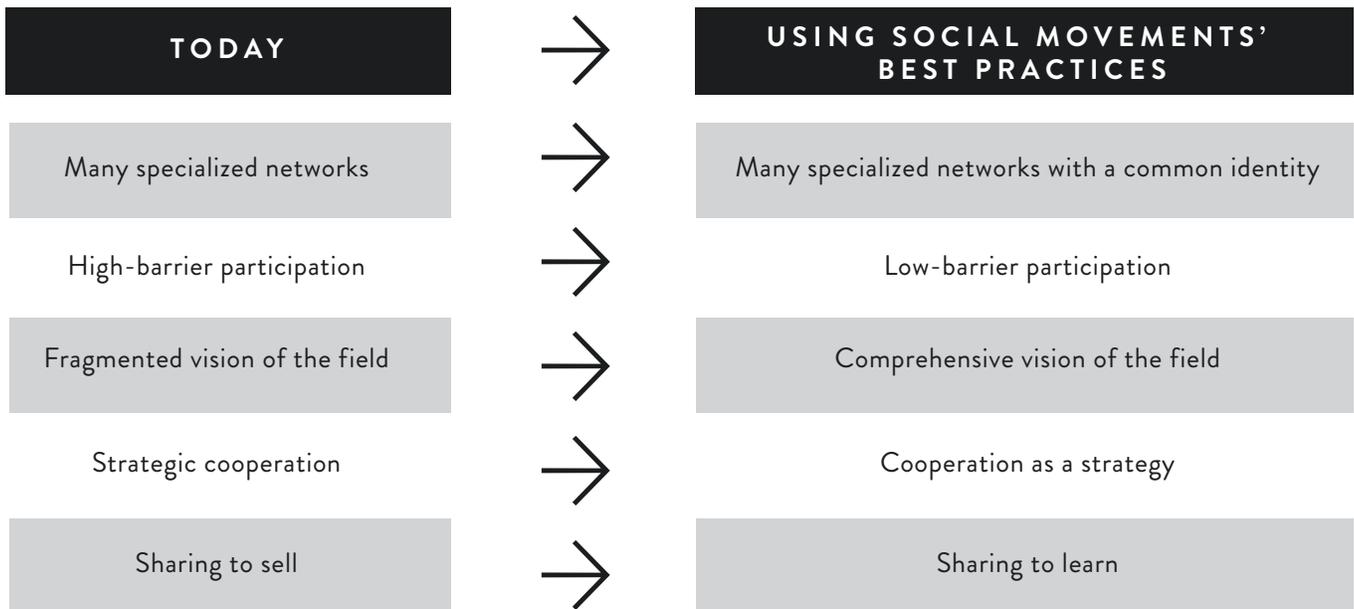
# PART B

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Taking into account the interest to build and strengthen the existing networks, part B of this document analyzes the success factors of social movements in triggering sustained collective action, to then explore the extent to which those best practices apply to the social

innovation field. Our aim is to understand if the organizations and individuals in the social innovation field could leapfrog from the successes obtained by social movements and their methods to act more like a collective and less as a collection of individual initiatives.

## HOW DO WE ENVISION THE FUTURE OF COLLECTIVE ACTION WITHIN THE SOCIAL INNOVATION FIELD?



## WHAT CAN SOCIAL INNOVATION LEARN FROM SOCIAL MOVEMENTS?

With over ten years of experience, Purpose has learned from the most effective social movements of the twenty-first century and has aimed to understand and replicate their success factors. In that process, it has identified six key elements that enable and trigger their capacity to act in a collective and sustained way: 1) **their scale and/or growth** 2) **grassroots activity** 3) **sustained engagement** 4) **shared vision** 5) **effective collaboration** and 6) **shared identity**. Using these categories as a lens, we aim to understand what social innovation can learn from the social

movement theory, and how people working in the social innovation field can better align their actions to obtain greater impact.

Applying the best practices identified by Purpose to the organizations participating in this research project, we were able to propose that, in order to boost their collective action, the organizations that compose the social innovation field could appropriate key milestones such as getting to a shared vision, a common identity, and effective collaboration.

## SOCIAL INNOVATION VIS-À-VIS SOCIAL MOVEMENTS' BEST PRACTICES

SOCIAL MOVEMENTS BEST PRACTICES <small>(as identified by Purpose<sup>5</sup>)</small>	DEFINITION	CURRENT STATE IN THE SOCIAL INNOVATION FIELD
 <p><b>GROWTH</b></p>	<p>Is the organization or movement growing at a rate that suggests the potential for penetration and awareness in the future? Has it reached the mainstream, such that it is known to and discussed by the public beyond those working on it?</p>	<p>Yes, although not entirely or homogeneously. The field has been expanding and growing geographically and in the number of organizations. Also, the field has started to show successes that can lead to penetration into the mainstream. However, some regions are still isolated from the conversation, and some barriers make it a very specialized topic, known only by a few people.</p>
 <p><b>GRASSROOTS ACTIVITY</b></p>	<p>Is some proportion of the organization or movement's activity pursued or driven by a community broader than the specialized public? Has it established grassroots activities?</p>	<p>Yes, although social innovation is still limited to specialized circles, as a methodology, it has started to penetrate communities, beneficiaries, and governments. A number of Social Innovation Organizations within the field are self-organized grassroots entities. Also, the field often engages multiple stakeholders like governments, academia, entrepreneurs, and the private sector in activities that require a high level of commitment.</p>
 <p><b>SHARED VISION</b></p>	<p>Is the organization or movement associated with a set of specific changes it is trying to make or a set of values it is trying to spread? Is this vision commonly understood, shared among, or articulated by participants?</p>	<p>No, the field is diverse and growing. Although most organizations share a broad sense of what the field is accomplishing and of their guiding principles, there is not a defined and commonly understood set of values and goals. When asked about the definition of social innovation, the 42 SIOs surveyed gave different definitions and versions of the core of their work.</p>

<sup>5</sup> Omidyar Network and Purpose (2016). "Engines of change: what civic tech can learn from social movements". In: <http://enginesofchange.omidyar.com/docs/OmidyarEnginesOfChange.pdf>

SOCIAL MOVEMENTS BEST PRACTICES <small>(as identified by Purpose)</small>	DEFINITION	CURRENT STATE IN THE SOCIAL INNOVATION FIELD
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**EFFECTIVE  
COLLABORATION**

Has the movement attracted a group of people who take active part in creating change—i.e., who do not just know or talk about it, but who take action?

No, Social Innovation Organizations share their interest in collaborative work—over 50% of our sample belong to at least one network—yet, all of them explained in different interviews and focus groups that they often face difficulties in translating those intentions into action. Collaboration is happening at a smaller scale, but—as seen in part A of this document—not with massive coordinated initiatives to achieve common goals.

  
**SHARED  
IDENTITY**

Do people who discuss, act on, or care about the subject self-identify an affiliation with it?

No, the ever-changing and diverse nature of the field makes it hard for its members to fully self-identify as part of it. There is no common language to refer to it or to define its members. When asked, some of them self-identify more with specific subsections of the field such as social entrepreneurship, civic tech, social lab, and consultants rather than with the entire social innovation field.

This analysis of the milestones attained by influential social movements allows us to conclude that, although Social Innovation Organizations have developed key elements for the construction of sustained collective actions—such as a constant growth, grassroots activities, and engagement by its member organizations—there are still some areas that have potential to be explored.

In particular, the field should work on reaching the milestones that are most underdeveloped from the movement-building perspective. To develop this pathway and according to the above-presented diagnosis, we propose working on three initial milestones.

-  **1. Developing a shared identity.**
-  **2. Creating a common agenda and working together.**
-  **3. Enabling an effective collaboration.**

These milestones are the starting point of a conversation that will evolve and require a constant redefinition of the strategy. It is fundamental to keep in mind that at the core of this agenda is the need to evaluate and shift the direction of the plan as necessary. In the following sections, we develop an analysis of these three initial milestones and create a series of recommendations regarding how and why they should be advanced.



# DEVELOPING A SHARED IDENTITY

BOOSTING  
COLLABORATIVE  
IMPACT THE MOMENTUM  
| FOR SOCIAL  
| INNOVATION

# DEVELOPING A SHARED IDENTITY

Generating a common identity is not an easy task. However, social movements have been able to do so when a) there is a common understanding of the situation, b) bonds are created and there is an effective motivation to participate, and c) there is a sentiment of solidarity developed through the collective experience

The conditions mentioned above suggest that there are two approaches to the creation of a common identity; a rational one, based on shared ideas and frameworks and an emotional one, based on the solidarity, trust, and sense of belonging created through shared experiences.

## SHARED FRAMEWORKS

In analyzing the possibilities of creating a collective identity based on the common definitions or ideas of what social innovation is, we identified two main challenges:

- The ever-changing boundaries of the field, which makes it hard to define and categorize fully.
- The absence of a broadly shared language and the fact that numerous concepts and categories are still contested or overlap with each other.

During our conversations with members of different organizations, they pointed to the fact that different organizations understand and apply concepts and methodologies in a different way, often making it difficult to “speak a common language.” Indeed, when asked what they understand by Social Innovation Organizations, the 42 organizations in our sample presented different definitions.

### WHAT IS A SOCIAL INNOVATION ORGANIZATION?

“A place that provides aspiring social entrepreneurs with the necessary tools to launch and grow their businesses.”

Diana Castañeda, Kunan

“A public-facing body that is tasked with supporting the generation and implementation of new ideas for the public good in one or more organizations.”

Glen Mehn, Nesta

However, and despite the wide range of types of organizations, issue areas and types of work, most of the SIOs share some commonalities in their definitions:

- **Where:** refers to the institutional space where the activities are performed (a lab, a hub, or an organization).
- **What:** relates to what they do (helping, improving, facilitating, and convening).
- **Why:** refers to the reason that explains their existence (the severity of the local needs or the complexity of global problems).
- **How:** refers to the methodology that SIOs apply to achieve their mission (experimentation, design thinking, prototyping, etc.).

## SHARED ETHOS

While the broad range of concepts and definitions continue to be a challenge for the creation of a common identity based on a theoretical framework, there is an ideological or philosophical core with the potential of generating an effective bond.

**Although creating a basic understanding of standard terms and tools is relevant and requires further academic efforts and research, the creation of a common idea of what the organizations in the field share could facilitate the process of developing a substantial identity.**

**Some hypotheses collected through our fieldwork and research are that SIOs commonly:**

- Want to do good and have a positive impact.
- Want to build sustainable change.
- Trust in the power of collective action: they want to get far, but together.
- Believe in horizontal schemes: the user at the center of the solution, not at the bottom.
- Are in a constant learning process.
- Persist in finding solutions by testing different approaches.

“The ultimate goal is to get people feeling confident that they can change their own lives themselves: they are the heroes of our stories.”

Asif Saleh, BRAC

### SOME LESSONS

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**Social movement theory demonstrates that shared identities are built through collective work** and that they are expressed in cultural artifacts like symbols, names, narratives, clothing, etc. With this in mind, we suggest that there is a potential starting point for the creation of a common identity based on a shared vision of the kind of work that Social Innovation Organizations pursue.

Furthermore, this shared identity can and should be cemented through the promotion of communal

experiences (events, challenges, and projects) that allow for the creation of emotional bonds of trust. While these relationships can be solidified through institutional channels, they also need to happen at a personal level.

Finally, we can learn that a shared identity can be promoted with the creation of cultural elements. In this case, there is an opportunity for the creation of a brand, a name, or other symbols that allow people and organizations to express their sense of belonging.

“Social Innovation Organizations need to speak a more open language.”

————— Bruno Defelippe, Koga

The potential of creating a unified set of values coincides in general terms with the conclusions of the most recent Social Innovation Exchange event, where the following set of shared values was compiled:

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**People-powered** • *Challenge-focused* • **Values-based** • *Dialectic-focused* • **on exchange** • *Social in means and ends* • **Asset-based** • **Critically self-reflective** • **An emergent and shared learning journey** • *Informed by complexity lens* • *Informed by a systems change frame* • **About integrity (walk the walk)** • **Inherently cross-sectoral** • *Focused on the root of problems* • **Committed to inclusion, equality, and fairness** • **Agile and rigorous** • **Diverse in approach and method** • **Biased to action and experimentation** • **Driven by passion for cause and a good purpose** • **Humble** • *Better together (collaborative)* • **Persistent and curious** <sup>6</sup>

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<sup>6</sup> Social Innovation Exchange (2017) "Social Innovation: The Next 10 Years. Insights from the SIX Wayfinder" Retrieved from: <http://bit.ly/2p1s2Pk>



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**CREATING A COMMON  
AGENDA AND WORKING  
TOGETHER**

BOOSTING  
COLLABORATIVE  
IMPACT THE MOMENTUM  
**FOR SOCIAL  
INNOVATION**

# CREATING A COMMON AGENDA AND WORKING TOGETHER

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The creation of a common agenda is the second milestone identified in the search for sustained collective action. In fact, certain shared challenges have the potential to unify diverse organizations with a dynamic joint agenda that could be further developed or updated depending on the new challenges that arise.

## GOALS: A SHARED TARGET

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As shown in part A, the need to create, share, and demonstrate systemic impact is essential for the social innovation sector. Indeed, multiple organizations are working around areas such as poverty alleviation and environmental protection, but there is not one clear goal or set of goals that unifies the work developed in those areas. Therefore, the creation of a common agenda should start with the creation of thematically developed and measurable goals.

For example, creating task forces around the advancement of the SDGs has the potential of organizing and aligning thematic efforts into solving key issues and monitoring the advancement of specific goals. The creation of a common agenda requires finding those challenges that can allow for the creation of collective victories and rewards.

“Impact should not be looked from a basic level; it should be looked as a generational change.”

————— Josiah Kwesi, ISpace

## IMPACT: MORE WITH LESS

SIOs, their donors, and stakeholders spend precious time, resources, and energy on activities such as brainstorming and prototyping. However, only a few organizations get to a stage of sustainable operation and scaling of the solutions they have ideated. In fact, **scalability is one of the most absent activities within SIOs in our sample.**

While everyone seems to agree that much more needs to be done, a few reasons could explain the limited efforts towards scaling:

- The field is so new that few organizations have had the time to develop and fully implement proven and scalable solutions.
- When the solutions are at a scaling phase, they are implemented by others (e.g. governments, entrepreneurs, spin-off organizations, etc.). Thus, SIOs are rarely credited for the impact.
- The results shown by SIOs, despite their size or actual impact, tend to pale compared to the large dimension of the social problems that social innovation aims to solve and the high levels of expectations and investment.
- The lack of information sharing prevents organizations from identifying and accessing existing and replicable models. Moreover, it prevents them from recognizing failed models.
- SIOs find innovating more appealing than replicating, operating, and scaling.
- Because of the focus of SIOs in innovating, they are usually staffed by people that are more interested and skilled in solving challenges and

“We—in the development sector—suffer from this disease called pilot-itis, everybody loves to pilot! But nobody knows which ones worked and which ones didn’t.”

Asif Saleh, BRAC

generating ideas than in making them operational.

To continue innovating, SIOs need to put scalability at the forefront of the battle for sustainability. **While there seems to be an agreement in the fact that innovation requires failure, there is little room for it. For many, failure is seen as a loss of resources, and as a luxury that few organizations can afford. It is hard to find resources for experimentation, and it is in this light that scaling can represent an alternative for showing results and getting new sources of revenue.** For funders, it can also help to diversify the risk portfolio by investing in tested and scalable models.

“Innovative finance enables smart risks.”

Lorenzo Bernasconi,  
The Rockefeller Foundation

## MEASURING AND TELLING THE STORY: SHOW ME THE IMPACT

Social Innovation Organizations continue to rely greatly on anecdotal evidence and qualitative evaluation to portray the impact of their work. These metrics are valid to the extent that they relate to one organization or initiative. While case studies measuring the number of people reached or resources spent can be effective to demonstrate that an initiative is working, they are not so efficient for measuring and isolating the causes of success. That kind of impact is better measured through comparative experiments and control groups that due to their level of complexity are the least used. Some of the reasons behind the limited access to impact evaluations are:

- The complexity of the operational contexts and social problems that social innovation intends to tackle makes it difficult to identify how one intervention—and not other—creates an overall change in a community.
- The creation of experiments with social groups facing precarious situations can entail serious ethical problems.

Impact evaluations based on treatment and control groups are costly, time-consuming, and need a long-term intervention to show results.

When piloting different solutions to one problem, sometimes it is hard to isolate the variable, or mix of variables that caused the positive impact.

**Given its shared nature and overarching character, the challenge of measuring and evaluating the aggregate impact has the potential of becoming a point on a shared agenda leading to enhanced participation and collective action.**

“We define innovation by the speed we can shift from scarcity to abundance.”

Emiliano Fazio, Njambre

Moreover, we believe that setting common goals, scaling, and measuring are part of a virtuous circle because 1) joint efforts can create more observable results 2) scaling increases impact and has the potential of opening the door to more funding 3) when joint efforts are planned and organized, the variables affecting the final result can be better isolated and measured, and 4) better measurements and impact increase the availability of funds for innovation.

VIII.



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# ENABLING AN EFFECTIVE COLLABORATION

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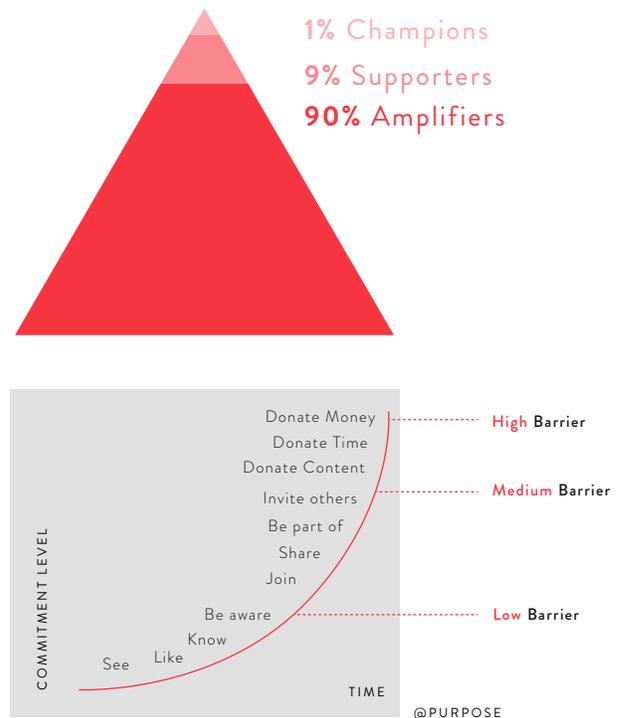
# ENABLING AN EFFECTIVE COLLABORATION

The definition of a common identity and a shared agenda requires a final step: organizing and turning ideas into action. This research identifies some of the existing barriers and enablers to collaborative work.

## WHO SHOULD LEAD AND PARTICIPATE?

The success of any social movement in generating the desired change is its ability to engage people and organizations interested in sharing the movement’s goals, identity, and basic principles. Taking this as a lesson implies that the social innovation sector needs to embrace and align as many stakeholders, industries, organizations, governments, and institutions as possible under basic principles to create a breakthrough.

According to Purpose’s model, Social movements are generally composed by 1% champions - who lead and develop the actions that require a higher commitment; 9% supporters, who have a less active role and participation; and 90% amplifiers of the movement’s general principles.



“We need decentralized, yet integrated networks and platforms co-creating across society to tip systems.”

Valeria Budinich, Ashoka

In other words, **not every member of a social movement needs to have the same level of commitment. It is necessary to identify the leaders with the required resources (experience, passion, commitment, time, money, and knowledge, just to name a few) to lead and moderate the conversation. Their role is to facilitate the creation of common principles and to communicate them effectively.**

## HOW SHOULD THE INTERACTION WORK?

Over the course of the research, it was clear that the social innovation sector enjoys the existence of different networks. However, and despite the wide offer of networks, knowledge sharing and collective efforts are still insufficient, partially due to the lack of a common identity and a shared agenda. The absence of 1) an overarching, organic way of connecting and 2) a one-stop solution to understand what is being done in the field, are also significant roadblocks.

**A meeting point:** According to our research, existing networks are doing a good job at connecting specific segments of the social innovation field with each other (i.e. according to a thematic area, stage of work, region, or type of organization). However, other organizations that cannot easily adapt to existing networks due to their thematic needs or because they cannot pay the membership fees, are being left in isolation.

**The existing approach to network-building has proved useful in connecting people and organizations with specific needs and interests but is not necessarily the best for getting beyond the “usual suspects” and supporting new actors that are arising. Moreover, it can hinder the capacity of organizations to act as a collective.**

Some of the considerations that explain the need for a low-barrier and inclusive meeting space include:

- The rapid growth of the field and the small scale of nascent organizations requires a system that welcomes them while they reach a greater size.
- Given that the largest and strongest SIOs are generally not located in the regions where the

“As social innovators who will WE bring into the innovation process to be more inclusive?”  
— Simone Ahuja, Blood Orange

social challenges are most acute, the emergence of a more powerful social innovation landscape outside the Global North requires a system that allows small players to access knowledge networks and partnerships in effective and simple manners.

- Large or global SIOs can benefit from partnering with local grassroots organizations with a strong presence in specific regions.
- Filtering knowledge is important and time efficient, but if there is no access to the general, unfiltered panorama of the social innovation field, it will be hard to understand and analyze it as a whole.

**A Wiki of Social Innovation:** The research also showed that the absence of a one-stop solution that allows social innovators to understand what has been tried before, what has worked, and what hasn't, is a key gap towards the achievement of greater impact. Trying to find that kind of information is a long process of online research and peer review that can easily lead to either the “re-invention of the wheel” or to spending time and resources making the same mistakes as others. This gap speaks to the need to create a service where all ongoing research, testing, and scaling are shared in a way that allows learning and leapfrogging between organizations.

## LEVERAGING TECHNOLOGY

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Technology has a key role as an enabler of the knowledge sharing processes required for the development of effective collaborative work.

**Admittedly, technology has potential at all stages of the creation of social movements by allowing the necessary information exchange to build some common principles as well as to allow connection from distant regions, experiences, and expertise for the solution of common challenges.**

Technological solutions such as a Slack channel, Whatsapp, or Facebook group can be an effective means to allow champions to share key content, moderate, and establish ground rules. These options can enable the creation of a more open and inclusive meeting point that can serve as the first stop before developing into thematic and regional conversations.

For the creation of a Social Innovation Wiki, the Wikipedia model with a defined leadership and moderation, a good tagging system, and a search engine can serve the purposes of the organizations (See Table 4, pg. 55).

## INCENTIVIZING PARTICIPATION

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Finally, we analyzed which could be the most effective incentives to move members of the social innovation community to share and work together. As identified in the rest of the research, a mixture of emotional and rational benefits is critical to obtain the necessary commitment and quality work to create positive impact.

There is a risk in understanding this as an issue of efficiency alone (share so that you can make your

job easier) or solely as a community issue (share because you want to help your fellow social innovators). Not only do both elements propel and solidify each other, but also different organizations (and people) respond to different kinds of incentives. Therefore, it is strategic to engage in actions that assure that organizations obtain an added value out of collaborating, but also to develop a sense of belonging that allows for this type of cooperative behavior to become a cultural feature.

**Belonging:** One of the greatest lessons of social movement theory is that people do not always act based on cost-benefit analysis and that aspects such as the social recognition, sense of belonging, and the idea of being part of something greater than oneself are a strong motivation for participation. The social innovation field serves a beneficial cause, and its members are an already self-selected group of people that cherishes the idea of being changemakers. For this reason, doing good and helping to advance a good cause will likely motivate participation.

Throughout our conversations with social innovators it became clear that the belief in the importance of collaborative work and knowledge sharing is not enough. All of the people interviewed agreed that trust, empathy, and personal bonds are necessary for people to facilitate collective work and be willing to assume the costs of coordinating, sharing the credit, compromising, negotiating postures, and coming to agreements. In other words, while technology can be of great help, nothing replaces face-to-face interaction; the need to build a cohesive community and create trust bonds is still central.



“If you—as a changemaker —know what is it that you want to accomplish, the tools or the how don’t matter as much. What really matters is getting to that result.”

——— Michelle Arevalo-Carpenter, Impaqto

**Added value:** The second set of incentives refers to the rational ways in which engaging in collaborative work can create dividends for the members of the community. In this regard, social movement theory indicates that a subset of incentives could be critical to the work of social innovation organizations: **1) collective victories and 2) individual rewards.**

The first one refers to the common achievements that can be generated through collective efforts and that incentivize further engagement. As the social movement experience demonstrates, the empowerment created by reaching common victories—small or large—is an important motivation that endorses and feeds the collective

engagement. For example, by working together on fixing a very specific challenge, the members of the social innovation community can get to know each other, bond, and elevate their commitment to the group.

The second incentive refers to the added value that belonging to a community can generate for the individual organization. This added value can be represented, for example, in reputational gains (belonging to the network creates prestige), effectiveness gains (belonging to the network generates preferential access to information, methodologies, or partnerships), or economic gains (funders rewarding organizations that belong and cooperate with each other).

“Individually we might not be able to influence outcomes, but collectively we have so much more power than we could ever imagine, and once you get a taste of that, I think it starts to become addictive!”

Jessy Tolkan, Purpose

IX.



# CONCLUSIONS & CALLS TO ACTION

BOOSTING  
COLLABORATIVE  
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# CONCLUSIONS

The analysis presented in this document was built using Purpose’s know-how in movement building, a literature review, and a set of interviews, workshops, and surveys with a sample of 42 SIOs. As such, it is not meant to represent the complete set and variety of challenges and experiences of social innovators across the globe. However, it is an effort to gain from the lessons learned by this subset of organizations and to suggest a potential agenda for the way forward. This agenda can and should be advanced through different stages, allowing for the consolidation of the leadership, the vision, and the mechanisms that further facilitate joining efforts and growing as a collective.

## IDENTITY BUILDING

- While the creation of a common identity based on shared knowledge continues to present challenges, there is a potential for creating an identity based on a common ethos and manifested in a specific ethical commitment.
- The process of identity building can be strengthened by the creation of personal bonds, shared experiences, and work.
- This common identity can be shared and solidified through the creation of cultural elements such as brands, symbols, and rituals

## AGENDA SETTING

- The creation of a common agenda should start with the creation of thematically developed and measurable goals, such as the SDGs.
- Once defined, those issue areas are subject to efforts in terms of scaling and impact evaluation.
- Both scaling and impact evaluation are cross-cutting key areas with the potential of uniting diverse organizations.
- Setting common goals, scaling, and evaluating are part of a virtuous circle that allows creating more observable and measurable results, increasing impact and leveraging funds for innovation.

## COLLABORATIVE WORK

- An inclusive approach to collaboration allows taking advantage of the impact created by a broad base of participants and a dedicated strategic leadership.
- Given the specialized nature of social innovation, there is a need for a dedicated leadership in charge of moderating, enabling interaction, and curating information, as well as creating strategic and tailored opportunities for participation and collaboration.
- This requires improving the systems in which the members of the social innovation field are interacting by creating a technologically-enabled meeting point and a comprehensive database of the knowledge and experiments generated by the field.
- Building an incentive structure based on emotional and rational benefits has the potential of incentivizing participation and collaborative work.

# CALLS TO ACTION

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Given these conclusions, inspired by a subset of organizations within the social innovation field, we now present some calls to action directed to the broader social innovation community of funders and practitioners.

## FOR SOCIAL INNOVATION ORGANIZATIONS

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- **Keep it simple:** is easier to reach to agreements based on broadly shared values and mission. The organizations in the field will have to compromise on their particular visions, definitions, and problems to find common objectives.
- **Just do it:** “no time” and “no money” have to stop being an excuse for not sharing. There are simple ways of sharing and learning from others that do not require much structure.
- **Give if you want to get:** the organization’s appetite for sharing cannot translate into getting without giving.
- **Take the lead:** collective action is not an organic process. A set of champions has to engage in systematic convening, sharing, and organizing.
- **Make it sexy:** implementing, scaling, measuring and failing have to become sexy aspects of any organization’s operation.
- **Take it to the next level:** develop the right skills in your organization to be able to implement, replicate, adopt, and scale solutions.
- **No impact, no game:** Focus on generating impact, and when successful, share and communicate it widely.

## FOR FUNDERS

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- **Use your power:** funders have a vital role they can leverage when defining the priorities and the rules of the field. They can have a significant impact by encouraging, funding, and rewarding groups and organizations that act collectively, scale, and share knowledge—including failures.
- **Lead by example:** both funders and grantees need to be open to sharing their failures.
- **Better together:** funders also have a role in going beyond their individual actions and use pooled funds to pursue larger and more impactful initiatives, as well as inviting and valuing collaborative work in their calls for proposals.
- **Be a champ:** becoming part of the leadership that helps to organize and align the field is also a relevant task for funders.
- **Balance:** balance your investments in all stages of social innovation: generating ideas, piloting solutions, and scaling successes.

## FOR GOVERNMENTS

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- **Do your thing:** governments are key actors in the scaling process and they can participate by testing and implementing proven methodologies generated within the social innovation field.
- **Trust:** Social Innovation Organizations have the potential of becoming the R&D departments of governments, and governments can support them with dedicated and patient funding.
- **Open Data:** provide the data needed to help SIOs work with all the assets they need to analyze the contexts in which they are operating.

## FOR ACADEMIA

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- **Unite:** academia is fundamental in strengthening the theoretical body of work and the frameworks developed by social innovators.
- **Partner:** universities can be key partners for SIOs to help measure impact and develop know-how management structures and hubs

## FOR EXISTING NETWORKS

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- **Take part:** continue the sectoral efforts and at the same time maintain a capacity to work together in matters that require reaching broad agreements.

## FOR THE PRIVATE SECTOR

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- **Support:** providing resources and expertise to solve challenges related to impact evaluation and scaling.



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# METHODOLOGICAL NOTE

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# METHODOLOGICAL NOTE

This research project was developed using a holistic perspective, including academic literature, reports and studies, as well as interviews, surveys, and focus groups. The information collected is both quantitative and qualitative, although, given the small size of the sample in this study, the majority of the conclusions and recommendations are based on the qualitative information and in the quantitative trends, only to the extent that they were supported by secondary sources.

## INDEX OF PARTICIPANT ORGANIZATIONS

WORKSHOPS	SURVEYS	FOCUS GROUPS	INTERVIEWS	NAME	LOCATION
X	X	X		17 Triggers	Cambodia
X	X			Acumen	USA
X				African Centre for Cities	South Africa
X				African Development Bank	Luxembourg
X	X	X		AfriLabs	Africa
X	X			Agora Partnerships	Nicaragua
X	X			Airbel Center at the International Rescue Committee	USA
	X	X		Alterna	Guatemala
X				Alternatives Africa	Kenya

WORKSHOPS	SURVEYS	FOCUS GROUPS	INTERVIEWS	NAME	LOCATION
X	X			Ashoka	USA
X				Aspen Network of Development Entrepreneurs (ANDE)	USA
X	X			Auckland Council Southern Initiative	New Zealand
X				Brigard & Urrutia (B&U)	Colombia
X				Blood Orange	USA
X	X			Bolsa Social	Spain
X				BongoHive	Zambia
X	X	X	X	BRAC	Bangladesh
X				BSR	USA
X				Buni Hub	Tanzania
X				CAF	Colombia
	X	X		Co-Creation Hub Nigeria	Nigeria
X				Colciencias	Colombia
X				COMFAMA	Colombia
X	X			Copenhagen Institute of Interaction Design	Denmark
X		X		CTIC Dakar	Senegal
X				Monitor Deloitte	USA
X				Departamento Nacional de Planeación (DNP)	Colombia
X	X	X		Design Society Development DESIS Lab, University of Johannesburg	South Africa
X				Eduemplea	Colombia

WORKSHOPS	SURVEYS	FOCUS GROUPS	INTERVIEWS	NAME	LOCATION
X				Elevar Equity	USA
X				Estrategias Corporativas	Colombia
	X			EtriLabs	Benin
X				Federación Nacional de Cafeteros	Colombia
X				Fundación Corona	Colombia
X				Fundación Mario Santo Domingo	Colombia
X				Futura Business Innovations	USA
X				G-Lab	Thailand
X				Glasswing International	El Salvador
X		X		Global Knowledge Initiative	USA
	X	X		Good Design Australia	Australia
X	X			Growth Mosaic ltd.	Ghana
X				Inter-American Development Bank (IDB)	USA
X	X			IDEO	USA
	X	X		Ilab Liberia	Liberia
X		X		Impact Hub Accra	Ghana
X	X			Impact Hub Network	Colombia
X	X	X	X	Impaqto Quito	Ecuador
X	X	X		InCompass Human-Centered Innovation Lab	Cambodia
X	X			InSTEDD	USA

WORKSHOPS	SURVEYS	FOCUS GROUPS	INTERVIEWS	NAME	LOCATION
X				Instituto de Cidadania Empresarial (ICE)	Brazil
X		X		Intellectap Innovation Lab	India
X		X		International Rescue Committee	USA
X			X	ISpace Foundation	Ghana
X	X	X		Jollibee Foundation Innovation Lab	Philippines
X	X			Koga Impact Lab	Paraguay
X	X	X		Kunan	Peru
	X	X		Laboratorio para la Ciudad	Mexico
X	X	X		MaRS Solutions Lab	Canada
X				McKinsey & Company	Colombia
X	X			Mercy Corps Social Ventures	USA
X				MEST	Ghana
X				Multilateral Investment Fund (MIF)	USA
X		X		Ministerio de Industria y Comercio	Colombia
X	X	X		NESsT	Peru
	X			Nesta	UK
X	X			New Ventures	Mexico
X	X			Nile Project	Egypt
X				Njambre	Argentina
X	X	X		Point B Desing + Training	Myanmar

WORKSHOPS	SURVEYS	FOCUS GROUPS	INTERVIEWS	NAME	LOCATION
X	X			Promethean Community	USA
X	X		X	Purpose	USA
X				PwC	USA
X	X			RLabs	South Africa
X	X			Ruta N Medellin	Colombia
X				Servicio Nacional de Aprendizaje (SENA)	Colombia
X				Shalupe Foundation	Congo
X				Social Impact for Angola	Angola
X				Social Innovation Center ESADE	Spain
X	X	X		Socialab	Chile
X		X		Startup Tunnel   Vihara Innovation Network	India
X				Tandemic	Malaysia
X				The Black Lot	Suriname
X	X	X		The Eastern Africa Resilience Innovation Lab	Uganda
X	X	X	X	The Lien Centre for Social Innovation, Change Lab	Singapore
X				The Rockefeller Foundation	USA
X	X	X		The West Africa Resilience Innovation Lab	Ghana
X				Transformance	USA
X				United Nations Development Programme (UNDP) Ethiopia	Ethiopia
X				United Nations Population Fund (UNFPA) Nigeria	Nigeria

WORKSHOPS	SURVEYS	FOCUS GROUPS	INTERVIEWS	NAME	LOCATION
X	X	X	X	UNICEF innovation lab	Jordan
X	X	X		University of Botswana DESIS Lab	Botswana
X				Ushahidi	USA
X				Whatscine	Spain

## ABOUT MOVILIZATORIO

**Movilizatorio** is a citizen engagement and social innovation lab incubated by Purpose. It is a space for experimentation, creation, and implementation of initiatives on citizen empowerment, leadership, and collective work. We combine strategy, creativity, communications, and technology to solve social problems. Our multidisciplinary team designs, implements, pilots, and evaluates initiatives, with the goal of scaling up the most effective ones. We work across an ample set of issues; some of our areas of impact include peacebuilding, democracy, education, gender equality, and sustainability.

## THE TEAM

This project was possible thanks to the sponsorship, advice, and constant accompaniment of the teams from FOMIN, The Rockefeller Foundation, and Compartamos con Colombia. In particular, Elizabeth Boggs Davidsen, Christine Ternent, César Buenadicha, Micaela Cordero, Norah Sullivan, Nobuyuki Otsuka, Amira Bliss, Susana Yepes, Viviana Mayor, and Valentina Vallejo. The final report was consolidated by a team from Movilizatorio and Purpose, composed of Jessy Tolkan, Juliana Uribe, Lina Torres, and Nadya Hernández.

## ABOUT PURPOSE

**Purpose** moves people to remake the world. Driven by people, enabled by technology: Purpose builds movements and new power models to tackle the world’s biggest problems. A certified B Corp, we create and launch our own ventures, collaborate with the world’s leading organizations, and develop technology, tools, and content that move millions to remake the world. From climate change and global LGBT rights, to the food system and gun violence in America, we’ve launched some of the biggest and most successful experiments in movement building and mass participation in recent years

## APPENDICES:

**TABLE 1. Governance Structures of Participant Social Innovation Organizations**

STRUCTURE	GENERAL BENEFITS	POTENTIAL CHALLENGES
<b>Nonprofit</b>	Flexibility Tax exemption for donors Independence	Unstable funding Highly competitive Limited economic incentives for founders and staff
<b>Government</b>	Greater impact on public policy More stable funding Access to key players	Legal and operational constraints. Reputational damage attached to the government's performance. Staff and funding highly dependent on political cycles
<b>Corporate Social Responsibility</b>	Stable funding Direct links to R&D departments and cutting edge technology Access to networks	Independence/alignment with the company's objectives Risk aversion due to reputational constraints Pressure to produce visible results for the company Lack of presence on the ground
<b>Social Enterprise</b>	Able to re-invest in the company and cross-subsidize projects Incentives to scale solutions, and build self-sustainable initiatives Can offer more attractive compensation packages for staff Independent from political agenda	Competition Balancing economic and social impact goals with those of partners, staff, and investors Lack of tributary incentives for donors and partners Has to show results faster to attract investors Poor incentives to share knowledge
<b>Academia</b>	Direct link to the academic and research field Credibility Access to an ample community of students that can be engaged in different parts of the process	Bureaucratic Limited funding Distance from the social impact they want to generate Risk aversion due to reputational constraints
<b>For-profit</b>	Best practices, guidelines and models available Easier to raise money and re-invest	Cannot receive funds from foundations or be subject to tax exemptions Focus in serving shareholders

## APPENDICES:

**TABLE 2. Innovation Methodologies Commonly Used by Participant Social Innovation Organizations**

TOOL/APPROACH	PROS	CONS
<b>Design thinking</b>	Learning from the user	Time consuming
<b>Visual communications</b>	Universal Easy to understand	Costly
<b>Brainstorming</b>	Inclusive Allows for creativity	Needs rigorous framing of the problem and methodology
<b>Mapping</b>	Identifies key stakeholders and initiatives Facilitates collaboration and participation Avoids duplication of efforts	Demands constant or organic updates
<b>Landscape analysis</b>	Allows broad understanding of the issue	Demands extensive resources that can be used in testing existing hypotheses
<b>Behavioral Insights</b>	Involves everyone in being part of the solution	Needs very specific definition of the goal Is hard to measure
<b>Data analytics</b>	Allows using hard data to prove hypothesis	Requires a lot of data Requires specialized, high-skilled staff

## APPENDICES:

**TABLE 3.** Key Networks Identified by Participant Social Innovation Organizations

NAME	LOCATION	WEBSITE
Afrilabs	Africa	<a href="http://afrilabs.com">http://afrilabs.com</a>
ANDE	Headquarters in Washington, full-time regional coordinators based in Brazil, Central America and Mexico, East Africa, India, and South Africa	<a href="http://www.andeglobal.org">www.andeglobal.org</a>
Ashoka	Global	<a href="http://www.ashoka.org">www.ashoka.org</a>
BMW Young Leaders	Global	<a href="http://www.bmw-stiftung.de/">http://www.bmw-stiftung.de/</a>
BRAC	Africa, Asia	<a href="http://www.socialinnovationexchange.org">http://www.socialinnovationexchange.org</a>
Bridge	India	<a href="http://www.bridgeinnovates.org">www.bridgeinnovates.org</a>
DESIS	Global	<a href="http://www.desisnetwork.org">www.desisnetwork.org</a>
Draper Richard Kaplan Fellows	Global	<a href="http://www.drkfoundation.org">www.drkfoundation.org</a>
EVPA	Europe	<a href="http://evpa.eu.com">http://evpa.eu.com</a>
GECES	Europe	<a href="http://www.ensie.org">www.ensie.org</a>
GSEN	Africa, Europe, Latin America, Australia, North America, and Asia	<a href="http://www.gsen.global">www.gsen.global</a>
Gerson Lehrman Group Social Entrepreneurs Fellows	New York	<a href="http://glgsocialimpact.com/fellows/">http://glgsocialimpact.com/fellows/</a>
Impact Hub	Africa, Europe, Latin America, Asia, and North America	<a href="http://www.impacthub.net">www.impacthub.net</a>
Resilient Africa Network	Africa	<a href="http://www.ranlab.org">www.ranlab.org</a>
Sistema B	Latin America	<a href="http://www.sistemab.org">www.sistemab.org</a>

NAME	LOCATION	WEBSITE
<b>SIX</b>	Africa, Canada, Europe, Latin America, Australia, Nordic countries, India, and Asia	<a href="http://www.socialinnovationexchange.org">www.socialinnovationexchange.org</a>
<b>UNICEF Global Innovation Labs</b>	Global	<a href="https://www.unicef.org/innovation/innovation_73237.html">https://www.unicef.org/innovation/innovation_73237.html</a>
<b>Unreasonable Institute</b>	Global	<a href="https://unreasonableinstitute.org">https://unreasonableinstitute.org</a>
<b>World Design Organization</b>	Africa, Europe, Latin America, North America, Oceania, and Asia	<a href="http://wdo.org">http://wdo.org</a>

## APPENDICES:

**TABLE 4.** How to Share Knowledge

WHAT TO SHARE	HOW TO SHARE	REQUIREMENTS	PARTICIPANTS
<ul style="list-style-type: none"> <li>• Methodology</li> <li>• Research, failures, success, platforms</li> <li>• Types of projects</li> <li>• Case studies</li> <li>• Experience in collaboration</li> <li>• Testimonials</li> <li>• Best practices</li> <li>• Questions</li> <li>• Challenges</li> <li>• New tools</li> <li>• Results</li> <li>• Lessons learned</li> <li>• Location</li> <li>• Big data/contacts</li> <li>• Ongoing social innovation projects</li> <li>• Processes</li> <li>• Videos</li> <li>• Address book</li> </ul>	<ul style="list-style-type: none"> <li>• Spreadsheets</li> <li>• Slack</li> <li>• Facebook</li> <li>• Whatsapp</li> <li>• Google drive</li> <li>• Dropbox</li> <li>• Linkedin</li> <li>• In person meeting</li> <li>• Ted channel</li> <li>• Webinars</li> <li>• Phone apps</li> <li>• Wiki: knowledge sharing platform</li> </ul>	<ul style="list-style-type: none"> <li>• Low resource intensity</li> <li>• Support requests not initially anticipated</li> <li>• Algorithm to filter users' needs and interests</li> <li>• No spam</li> <li>• Curated content</li> </ul>	<ul style="list-style-type: none"> <li>• Different teams and types of organizations</li> <li>• Social innovators</li> <li>• Mixed audience NGOs, funders, universities</li> <li>• Organizations who can scale efforts</li> <li>• Country representatives /committees</li> </ul>

# WANT TO KNOW MORE?

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Download the podcasts created during the Global Summit on Social Innovation on the website <http://www.akordefd.com/programa/el-avispero/>

## **Episode 1 Jessy Tolkan – Purpose**

“Innovation and technology for civic mobilization, Purpose’s case”

Jessy Tolkan, Heads of Labs at Purpose, has been leading social mobilization campaigns at a global scale. In this episode, Jessy talks about the most successful strategies for creating real changes through campaigning, social movements and citizen leadership. She also presents ideas on how to leverage technology and fieldwork to reach to better results.

## **Episode 2 Michelle Arevalo-Carpenter - Impaqto Quito.**

“Boosting social entrepreneurship in Ecuador, the case of IMPAQTO Quito”

Impaqto Quito is a space where collaboration is at the center. That is how Michelle Arevalo-Carpenter, its Co-founder defines it. She talked with El Avispero about being an entrepreneur and supporting others to go from an idea to a high-potential social business.

## **Episode 3 Asif Saleh – BRAC**

“Scaling solutions in social innovation, the case of BRAC in Bangladesh”

Asif Saleh comes from the largest non-profit organization in the world, BRAC in Bangladesh. In this episode, he talks about tackling large-scale issues such as poverty and climate change with a model based on frugal innovation and scaling.

## **Episode 4 Eva Kaplan – Unicef Innovation Labs**

“Humanitarian crisis and social innovation, the case of Unicef in Jordan”

Unicef’s Innovation labs are part of a global network and Eva Kaplan Works for one of them in Jordan. In this episode, Eva talks about her experience innovating in the context of a humanitarian crisis and within a large International Organization such as Unicef.

## **Episode 5 Jonathan Chang - The Lien Centre for Social Innovation, Change Lab.**

“Innovating from the Academia, the case of the Lien Centre in Singapore”

Jonathan Chang leads the The Lien Centre for Social Innovation. In this episode he talks to El Avispero

about the type of leadership needed to be a social innovator and the ways to connect the academia and the young people to the social innovation process.

### **Episode 6 Josiah Kwesi Eyison – ISpace Ghana**

“Innovation and technology from Africa to Africa, the case of ISpace in Ghana”

Josiah Kwesi Works for ISpace, a social entrepreneurship that promotes the development of new technologies from the African people to the African people. Through the installment of new capacities, the work with youths and the development of an entrepreneurship ecosystem, ISpace seeks to contribute to the creation of opportunities in Ghana.



## THE FIELD OF SOCIAL INNOVATION ORGANIZATIONS

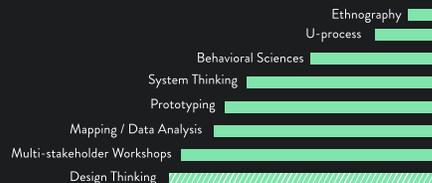
### 1 STILL YOUNG

On average Social Innovation Organizations (SIOs)

5 BETWEEN 6 YEARS OLD

2 EXPANDING  
New organizations are emerging across a broad range of issues and geographies

### 6 DRIVEN BY DESIGN THINKING



### 3 ALWAYS ADAPTING

## FLEXIBILITY

one of their greatest assets

### 4 GLOBAL IN SCOPE

ALMOST 50% have global influence

### 5 WIRED BY TECHNOLOGY

SIOs currently focus mostly on issues such as technology, health, environment and sustainability

### 7 EXPERTS IN USING NEW TOOLS

Most recently they are incorporating Behavioral Sciences and Data Analytics

## THE CHALLENGES OF SOCIAL INNOVATION ORGANIZATIONS

### 8 STAYING ALIVE

## SUSTAINABILITY

is a key challenge for SIOs.

### 9 GREATER CHALLENGES, MORE RESOURCES

SIOs identify funding as the top challenge for their sustainability

### 10 NON-PROFIT

Most SIOs are non-profits that are highly dependent on external donors



### 12 NOT ONLY ABOUT THE MONEY

Other key challenges for SIOs:

- ✓ Reaching the scaling phase
- ✓ Political willingness
- ✓ Community engagement
- ✓ Measuring and evaluating impact

### 11 COMPETITION

The constant competition for similar funding sources hinders the cooperation between SIOs

### 13 WHO'S SCALING?

SIOs focus more on identifying and testing new solutions, and less on scaling and financing the existing ones



- ✗ Mobilizing multiple stakeholders to drive solutions
- ✗ Developing and testing new solutions
- ✗ Accelerating existing solutions for investment readiness
- Scaling a solution

## THE ADDED VALUE OF SOCIAL INNOVATION ORGANIZATIONS

### 14 DIVERSITY STRENGTH =

SIOs are experts in having a multi-stakeholder approach and building multidisciplinary teams



### 16 WORKING TOGETHER

SIOs excel at partnering with strategic and diverse allies.

- Communities
- Governments
- NGOs
- Universities
- Multilaterals
- Mentors
- Researchers
- Corporations
- Civil Society

### 17 CREATING LASTING CHANGE

When prioritizing projects, SIOs focus on the potential impact



### 15 QUALITY OVER QUANTITY

SIOs focus more ON LIVES IMPACTED than on revenue generated or # of innovations produced



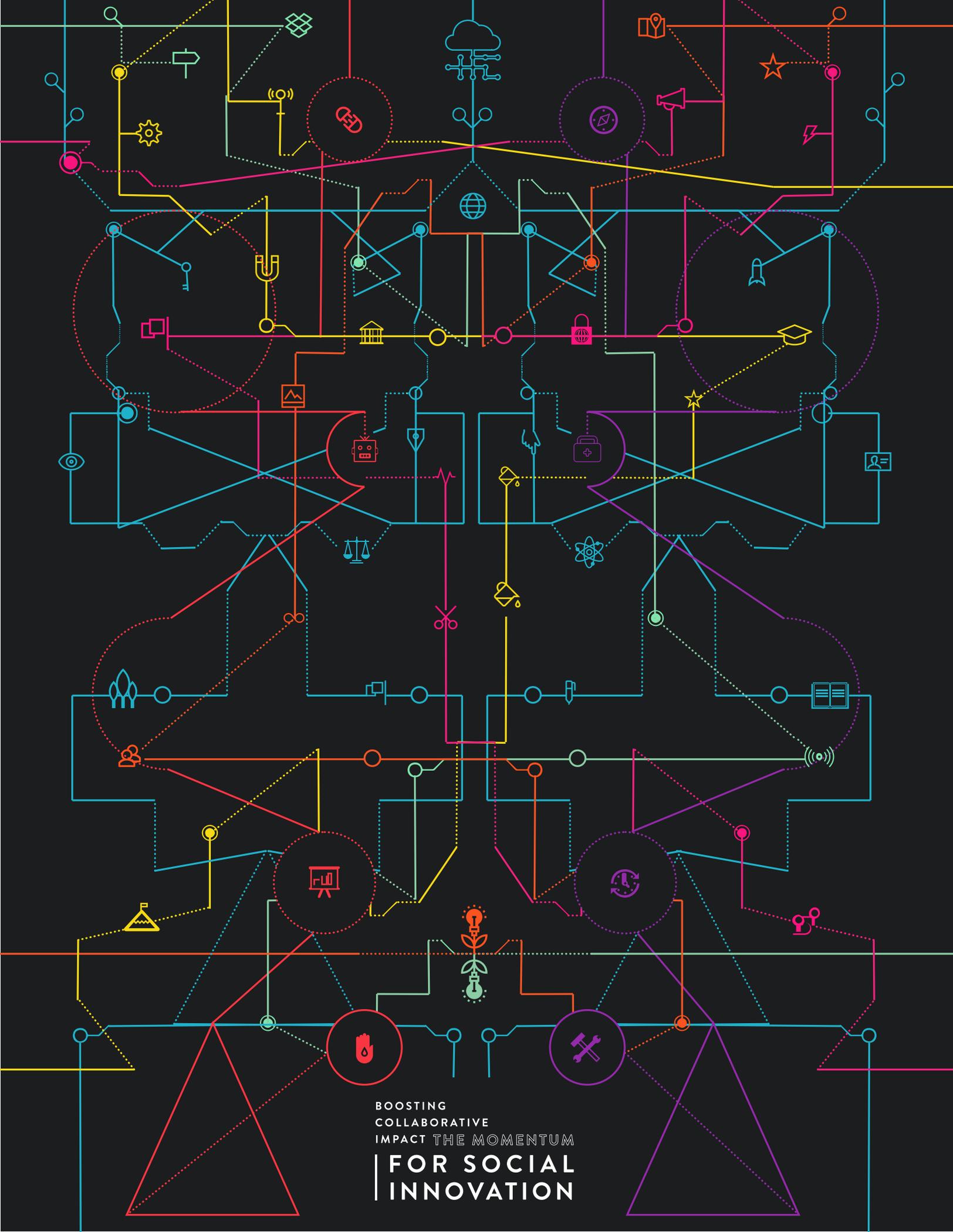
### 18 LONG TERM VISION

SIOs pursue longer-term projects, thus generating strong connections with different stakeholders

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