

## Open Source Business Resource, September 2008: Social Innovation

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### Open Source, Social Innovation and a New Economy of Engagement, Stephen Huddart

*"The global epoch we have now entered will embrace many forms of wisdom and dialogue, or it will not be. While humans must continue to build on previous accomplishments, this new, global age must also rise to the challenge of creating better and more effective forms of civic and social engagement to solve problems on a world scale. It must create synergies among the living [forms of] knowledge of people from all parts of the world."* [Introduction to Social Analysis Systems](#)

Open source technologies and social innovation have emerged at a time when it is critical to adopt inclusive, creative, multi-disciplinary approaches to solving complex social and environmental problems. This article examines the relationship between open source, social innovation and engagement. It reviews four areas where their interplay has afforded organizations working in the (mainly Canadian) social sector with new tools and approaches to managing change. These tools include: i) collaboration and learning platforms; ii) social networking programs; iii) resource allocation websites; and iv) advocacy tools.

An examination of two organizations leading social change in Canada suggests that to address society's larger problems, social innovators must also make use of economic incentives, facilitated or hosted conversations, and partnerships. Finally, two areas where innovation is urgently needed are identified as sustainability education and the means by which we participate in democratic processes and government decision-making.

#### **A Challenge Unlike Others**

We are present at a time of two profound and linked crises. One is environmental, marked by humanity's unsustainable utilization of earth's natural capital. The second has been termed a crisis of the human spirit, evident in our addiction to material culture, and the concomitant erosion of a sense of connection and belonging, of shared values, or of place and purpose. On one side we have extreme weather events linked to climate change, like Hurricane Katrina. On the other, there's the uncomfortable realization that the values upon which our society operates may be less than optimal for our long term survival--witness the recent unraveling of the US financial system.

Since any economy is a relationship between people and the earth, it is time to commit to ["learning to live like we plan on staying here."](#) In paleobiological terms, we have entered a period of punctuated equilibrium, when our species must adapt and evolve speedily in light of changed circumstances, or else fall into precipitous decline. We argue that the notion that we can leave this to government, the free market, science and technology, or even civil society is obsolete. Imagining and shaping a future that is equitable, inclusive, sustainable and beautiful has become everyone's charge.

By offering a growing array of new tools and approaches to our most intractable problems, open source principles and social innovation are introducing adaptive capacity into large-scale systems from health and education to agriculture and urban design. We are not speaking of a panacea, however. The work of deepening our commitments to one another and of co-creating healthy futures for all is generational in scale and buffeted by countervailing forces. For the innovations discussed in this

article to have enduring and transformative impact, they need to be understood as preliminary steps in a larger shift towards an ongoing culture or economy of engagement.

### **Open Source Plus Social Innovation = Engagement**

For the purposes of this discussion, we go beyond source code and define open source as non-proprietary design and decision making and management processes that accept ongoing improvements reflecting different perspectives, capacities, approaches and priorities.

By enabling horizontal (peer-to-peer), vertical (up-down and down-up) and reciprocal engagement, open source principles and methods enable large numbers of people from different disciplines to work together to solve the myriad unexpected problems that surface in large scale projects.

Social innovation, to use Frances Westley's definition, is "an initiative, product or process that profoundly changes beliefs, basic routines, resource and authority flows of any social system in the direction of greater resilience. Successful social innovations have durability, impact and scale." [Editor's note: this definition is to appear [here](#)].

An example from the world of moviemaking illustrates the symbiotic relationship between open source, innovation and engagement. In 1995, Pixar released Toy Story, the world's first computer-animated feature film. Eight other features have followed, all of which have been blockbusters. Pixar's approach to making films differs markedly from other studios, and is centered on getting people from different disciplines, and at different levels in the organization, to treat one another as peers. Pixar's three operating principles are:

1. Everyone must have the freedom to communicate with anyone.
2. It must be safe for everyone to offer ideas.
3. Stay close to innovations happening in the academic community.

While the first two principles may seem self-evident and highly engaging, the third is unexpected and raises questions about open source knowledge creation and intellectual property rights. Today, when inventions build on the work of many others, having to deal with multiple patent owners can suppress innovation. For Pixar, the relationships it nurtures and the talent it attracts by openly publishing its technological breakthroughs reinforce the company's commitment to the [principle](#) that "technology inspires art, and art challenges the technology."

Something similar happens when open source tools are applied to the social sphere: technology inspires social innovation, and social innovation challenges technology. In addition to generating new approaches to existing problems, beneficial outcomes include transfer to other domains, and to new levels of scale. At each step in those processes, more people become engaged, and what once seemed impossible or implausible becomes common practice. Thus, engagement is a means of producing, disseminating and embedding social change.

### **Innovative Tools for Social Innovation**

Here are four clusters or categories of tools for social innovation that demonstrate considerable overlap with open source methodologies. Since social innovation that is collaborative takes place using both open source and proprietary platforms, reference is also made to proprietary software products.

**1. Collaboration and learning platforms:** platforms for learning and collaboration create cerebral networks that amplify our human capacity for managing complexity. Linux (open source software development) and Wikipedia (open source knowledge sharing) harness the power of many minds to build accessible global resources. Thousands of organizations use similar means to build on-line communities of practice, employing feature-rich websites or programs. An example is [onefish](#), a global community of fisheries biologists.

With such tools, civil society organizations are able to manage collaborations that until recently would have been too time consuming or simply unaffordable. In 2007, Community Foundations of Canada used [Sharepoint](#) to coordinate the production and release of [Vital Signs](#), a collection of report cards on quality of life indicators in 11 cities as well as a national report synthesizing the results.

Such platforms are environmentally important, in that they reduce the necessity for face to face meetings, while adding value to meetings when they do occur. Conference organizers are finding websites like [Wordpress](#) helpful for posting speaker biographies and presentation notes. [Survey Monkey](#) puts powerful polling ability into the hands of everyone.

**2. Social networking websites:** Facebook and YouTube, while not open source platforms themselves, have become essential tools for social activists, providing local to global networking and communications capacity at low cost. Leading social innovators are developing new ways to apply social networking technology to organize activities in the real world. The [Plan Institute](#) in Vancouver, for example, is developing [Tyze](#), which enables caregivers to organize an online support network.

Looking for people in Calgary who share your interest in medieval tapestries? [Meetup](#)'s tag line is "use the internet to get off the internet" and is used by people to find others with shared interests. Such innovations are building new social capital and counter Robert Putnam's thesis that we are becoming a society of people "[bowling alone](#)".

The challenge of connecting on-line activity to social change in one's own community, and around the world, is one that Taking IT Global ([TiG](#)) is exploring. With a global presence, it provides opportunities and learning about youth engagement in social and environmental issues, using a suite of continually updated tools and forums. There is significant potential for platforms like these to become increasingly important in our schools. Interestingly, TiG has found that adding an in-person complement to its on-line gatherings has a powerful catalytic effect on engagement and collaboration.

**3. Resource allocators:** a leading Canadian innovation in this area, [Canada Helps](#), enables the public to make on-line credit card donations to any one of 83,000 registered charities, and receive their tax-creditable receipt immediately. Canada Helps is a non-profit and deducts a 3% fee to cover credit card processing charges and its own costs which are far below the usual costs of fundraising.

[Kiva](#) is about micro-finance, not charity. As the first globally accessible web platform of its kind, it builds on [Mohammed Yunus](#)' original idea to enable anyone in the world to make loans of as little as \$25 to a pre-screened portfolio of projects in developing countries. Interest paid by borrowers is used to finance the work of local and regional project assessors. Lenders do not receive interest beyond the satisfaction of knowing that they have helped a micro-entrepreneur in the developing world--and 99% of loans are fully paid back.

**4. Advocacy tools:** Canadians of varied political stripes cheered recently when Green Party leader Elizabeth May was admitted to the national leadership debates. An on-line petition had gathered close to 100,000 names in a few days. As a tool for direct democracy, in which citizens are able to communicate their views to politicians, this is similar to polling, which takes a snapshot of public opinion at a particular moment. A leading formulator of on-line petitions is [Avaaz](#), which has had a discernible impact on a number of environmental and human rights issues.

These four clusters of activity exemplify the symbiotic relationship between tools for social innovation that are closely tied to open source technologies. Essentially, they make engagement easier by providing a substitute for letter writing, swiftly managing donations, or reducing logistical barriers to collaboration. The cost of entry is not onerous in terms of time or financial resources, and the tools consistently fulfill their promise.

### **Making a Difference**

The question arises whether these innovative tools, and their continuous improvement in open source communities, are sufficient in and of themselves to constitute or engender larger social shifts. In effect, this is to ask whether the tools are driving social change or whether other factors are involved. We can deduce the answer by examining the work of two leading social innovators which are grantees of The J. W. McConnell Family Foundation: the [PLAN Institute](#) of Vancouver and Toronto's [Framework Foundation](#).

PLAN Institute's goal is to reduce the insecurity, isolation and loneliness of people who are marginalized by disability, according to the principle that everyone has a duty to contribute. Social innovations extend to the aforementioned Tyze program and introduction of Registered Disability Savings Plans (RDSP) at the federal level. PLAN is working to create public policy and financial instruments to deliver RDSP's in every province. The result will be fundamental and potentially far-reaching changes to resource flows in support of vulnerable individuals and families. PLAN also hosts a reflective dialogue on the nature of citizenship and is collaborating with institutional partners in the [Social Innovation Generation initiative](#), to open new space for social innovation in Canada. In its combined use of economic instruments, reflective dialogue and collaboration among unlikely partners, PLAN's work presages the shape of social innovation to come.

A similar multi-disciplinary, participatory approach is evident in research and policy initiatives like [Sustainable Prosperity](#) which is linking academics in various fields with economists and leaders from business, government and civil society to introduce ecological fiscal reform in Canada. Similarly, [Causeway](#) is building a marketplace for social purpose capital.

Toronto-based Framework Foundation is fostering a volunteer ethic among a new generation of young professionals, using a comprehensive and innovative volunteer recruiting and management program. Framework purchases work from emerging artists and organizes public social events where young people learn about and volunteer with civil society organizations, and then bid on the displayed artwork using their pledged volunteer hours.

Framework's operation is scaling up quickly and is managed using new generation web tools. Its ability to engage netizens in face to face social activities leading to community volunteering, while supporting emerging artists, in some ways parallels PLAN's work, inasmuch as it involves incentives, new conversations, and an unusual mix of partners. A further parallel is apparent in Framework's development of an on-line Civic Footprint calculator that enables individuals to track their community involvement the way they would their net worth. Like Tyze, it reflects the principle highlighted earlier, that technology challenges social innovation and vice versa, with a measurable engagement dividend.

Considered together, PLAN and Framework employ strategies in which open source and social innovation increasingly overlap, with results that are generative for their respective domains.

### **An Unmet Need**

There are two areas where open source and social innovation are needed rather urgently.

One is in education for sustainability. If we are to meet our obligations to the coming generation, to equip them to play an active role in co-creating the world they want, we need to engage young people now, using the web tools with which they are familiar, and applying them to a much broader range of imaginative action learning opportunities. The McConnell Foundation's [Green Street initiative](#), originally a Web 1.0 platform for teachers to access education programs from Canadian environmental organizations, is currently being adapted to this purpose, employing among other means, closer alignment between environmental and arts education.

A second and even more fundamental place to direct such efforts is towards our practice of democracy. Thoughtful commentators on politics as currently practiced in Canada have pointed out that the means exist for more effective public engagement in public process. [Lenihan et al](#) have demonstrated that new forms of engagement in government decision making would generate better

decisions and address public scepticism about governments generally. In place of opinion polling and consultation processes that are prone to becoming competitive processes, they propose deliberative dialogue leading to inform action decisions.

The Government of New Brunswick appears ready to adopt this [approach](#). Social Analysis Systems, mentioned in the opening quote, offers an open source toolkit for managing collaboration among diverse stakeholders. [Treehouse](#), a non-profit public process convener in Toronto, has a suite of tools designed to elicit "great ideas from minds that don't think alike".

### **Conclusions**

The symbiotic relationship between open source methodologies and social innovation is contributing to a renewal of civic engagement.

In and of themselves however, such tools and processes may not be sufficient to effect systemic change. It is when we add economic incentives, social process tools for public deliberation and decision making, and new collaborations that a new economy of engagement becomes possible. An especially important element in this fruitful equation is the need to continuously link change efforts to work in education and research.

If we are to meet the environmental and social challenges mentioned in the opening paragraphs of this paper, we can hardly afford not to pursue this work vigorously and imaginatively.

### **Recommended Resource**

[Toward a New Consciousness](#)