Learning as Social Innovation

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Abstract

Learning drives social innovation. It is the desired outcome, the primary tool and the personal praxis shared by all social innovators. In this paper we describe a whole-person learning initiative that seeks to build social innovation competencies and capacities and we discuss the growing conversation between inner work and system change approaches. We offer a brief overview of the literature related to the interior qualities exhibited by effective social innovators along with the learning approaches required to cultivate them. We describe the program framework for a learning innovation called the *Positive Deviants Fellowship* that draws from complexity theory, developmental psychology and transformative learning, and articulate four core systems learning principles that shape its design by way of inviting further conversation with other social innovators.

Introduction

Social innovation holds a radical premise. It does not simply offer new solutions to entrenched social challenges. It seeks to transform the complex and largely invisible web of systemic relationships that keep generating such challenges. According to Westley et al, a social innovation refers to any:

initiative (product, process, program, project, or platform) that challenges and, over time, contributes to changing the defining *routines, resource* and *authority flows* or *beliefs* of the broader social system in which it is introduced.[1]

This definition reminds us that social innovation is not the thing that social innovators *do* - it is the desired *outcome* we aspire to. Our interventions only become visible as social innovations retrospectively if they have impacted the systems they seek to influence. It is easy to mistake the means for the end.

This begs the question; *what do successful social innovators actually do?*

They are in the *learning* business. Learning is the flywheel and beating heart of all social innovation and system change. Learning sharpens analysis and builds capacity to address not only the *downstream* symptoms of a particular social problem but the *upstream* systems that keep generating such symptoms. At their core, social innovation processes attempt to create the learning conditions required to address complex challenges and meet adaptive challenges where the changes sought require people to not only employ their skills and life experience, but potentially alter their mindset, behavior or perspective.[2] Reflected in the voices of scholars, practitioners, activists and community organizers alike, we find three consistent insights:

1. **Learning is the central dynamic of change processes.** Learning is the thread that runs through all collective change strategies from Freirean popular education movements to participatory action research initiatives to multi-stakeholder social labs. It is learning that enables us to navigate exponential change, systems collapse and accelerating complexity.[3] Without learning, there can be no change, adaptation or evolution.

2. **Learning is the primary intervention tool used by social innovators.** They facilitate collective learning processes of sense-making, analysis, systems mapping, deliberation, wisdom harvesting, participatory research and evaluation that are intended to generate transformative outcomes. Effective social innovators are those who can foster an 'ecosystem' for learning, innovation and insight across the organizations and communities they serve.

3. **Effective social innovators engage in lifelong, whole-person learning**. The efficacy of social innovation *competencies* - the tools and processes used by social innovators - are directly tied to and mediated by a constellation of intangible inner *capacities*. Competencies can be learned through a range of relatively conventional learning strategies – often called *informational learning*. Capacities are developed through a range of experiences and ongoing practices that foster *transformative learning*. Whole-person learning is a combination of both transformative and informational approaches that results in developmental shift.[4]

Most social innovation education is informational. It supports practitioners to gain new skills and knowledge, new ways of organizing information, and new tools and processes. Capacity development, on the other hand, results in a categorical worldview shift –an increase in a practitioner's interior complexity that has been directly tied to leadership efficacy.[5] A useful way to think of the difference between competence and capacity can be found in Kegan's differentiation between 'what we know' and 'how we know.' The latter, he suggests, is cultivated through a developmental process he identifies as *transformative learning*.[6]

The term *transformative learning* was originally used by Mezirow to describe the distinct educational processes that can be used to examine our beliefs and systems of meaning-making and to expand our understanding of ourselves and the world around us.[7] It has grown to encompass an increasingly eclectic body of theory and practice. O'Sullivan offers an expansive definition, suggesting that:

> Transformative learning involves experiencing a deep, structural shift in the basic premises of thought, feelings, and actions. It is a shift of consciousness that dramatically and irreversibly alters our way of being in the world. Such a shift involves our understanding of ourselves and our self-locations; our relationships with other humans and with the natural world; our understanding of relations of power in interlocking structures of class, race and gender; our body awareness, our visions of alternative approaches to living; and our sense of possibilities for social justice and peace and personal joy.[8]

Omer suggests that social innovators who are able to impact complex systems can be understood as *transformative leaders*; they are leaders who undergo transformative learning themselves and catalyze transformative learning for others.[9] Central to his perspective is the idea that transformative learning is not something we simply facilitate for others. It is through our own ongoing participation in transformative learning processes that we build the capacity to facilitate such processes for others. The two are inextricably linked.

The Wolf Willow Institute

The Wolf Willow Institute is a recently formed Canadian social enterprise that approaches whole-person learning as a critical systems intervention that can lead to positive outcomes across multiple challenge domains. The Institute is one of several initiatives that have emerged from the work and relational legacy of the Social Innovation Generation, a collaborative partnership that sought to address Canada's most pressing social and ecological challenges by bringing communities, practitioners, scholars and funders together to establish an enduring culture of impactful social innovation.[10] This included a focus on the development of open-source social innovation curriculum which included the creation of the *Getting To Maybe* residency for social innovators in 2015. This intensive, month-long residency ran for four years and - in addition to the more familiar palette of social innovation theory, tools and methodologies – it included non-traditional pedagogical elements such as Indigenous ways of knowing, arts and nature-based learning, psychological depth work, somatic exploration and contemplative practice. Continuing

developmental evaluation revealed that these non-traditional elements were deeply impactful for participants. A significant number described this form of learning as 'life-changing' and suggest it has not only re-shaped their social innovation practice but continues to grow in value over time. Grounded in the experience of these fiercely practical social innovators, and rooted in the principles and practices of complexity theory, developmental psychology, and transformative learning, we are building a new suite of learning opportunities to enable a new generation of practitioners to build inner or developmental capacity in the midst of hyper-complexity and an increasingly volatile and uncertain world.

We are not alone.

Wherever we look, we see systems change educators and practitioners exploring the link between various forms of *inner work* and system change.[11] There is a robust dialogue that can be seen in the research and popular literatures, in numerous online forums and in the emergence of new networks, organizations, partnerships and publications. We understand this movement to be a kind of meta-conversation that is emerging as a number of distinct movements, disciplines and conversational enclaves become increasingly inter-connected. These include (but are certainly not limited to) the following:

- **Social change movements** working to dismantle systemic patterns of injustice and harm, (including activists from human rights, LGBTQ+, racial justice, feminist, disability, environmental, climate change, post-colonial, healthcare access and anti-poverty movements).
- **Indigenous people's** sovereignty, healing and cultural revitalization movements.
- **Socially-engaged spiritual traditions.** The convergence of Buddhist contemplative traditions with social change initiatives has been well-documented. But variations of this phenomenon can be found across multiple religious and cultural traditions.
- N**euroscience** research and the multiple lines of scientific inquiry that are emerging around the nature of consciousness (e.g. research into 4E cognition, flow states, psychedelics, mindfulness, neuroplasticity and self-regulation).
- **Psychological research and practice.** The growing debate between developmental psychology and complexity theory, the insights of organizational, positive and eco-psychologies along with various **trauma-informed** movements.
- **Change-oriented educational movements and traditions** – such as critical pedagogy and transformative, experiential, whole-person and adult learning approaches.
- **Integral** theorists and practitioners combining transformative inner work with various social technologies.
- The **leadership** field in general (that draws omnivorously from the high performance and human potential movements) and the **systems leadership** field in particular.
- A range of **depth-oriented approaches** that draw from traditions such as arts-based learning, archetypal and depth psychologies, altered states research, and somatic traditions.

The cross-pollination between these traditions and the broader fields of social change is leading in turn to the emergence of new systems learning initiatives. Readers familiar with the adaptive panarchy cycle will quickly recognize the pattern here. [12] In the midst of rapid system breakdown, an exciting, slightly chaotic field of educational experiments are emerging – all looking for relevance and resources. Much of the experimentation involves *bricolage* – novel recombination of existing approaches brokered within a rapidly evolving network of players – from well-established colleges and prestigious fellowships to self-organizing networks of community activists. A dynamic educational ecosystem focused on building systems literacy, complexity fitness and leadership competencies is starting to emerge along with a growing interest in what has been called the *interior condition*.

Inner Work

Otto Scharmer famously observed that "*the success of an intervention depends on the interior condition of the intervenor."[13]* This interior condition, and its relation to the leadership efficacy and external changemaking, continues to be mapped and described by numerous scholar-practitioners. Berger and Johnson for example describe it as a quality that is inherently *developmental*. As the demands of our external environment increase in complexity, they argue that we must not only learn new skills, but develop a new level of coherence or 'complexity fitness.'[14] Such fitness underpins three *core habits of mind* – which they identify as asking different questions, taking multiple perspectives and seeing invisible systems dynamics. This perspective is echoed by Senge, Hamilton & Kania who similarly identify three core competencies central to the kind of *systems leadership* required for social innovation which they describe as a) an ability to 'see' larger systems; b) the ability to foster deep reflection and generative conversation; and c) the ability to shift a collective focus from reactive problem solving to "co-creating" a desired future.[15] Like Berger and Johnson, they argue that such capacities cannot simply be learned once and then successfully applied; they are developmentally rooted and emerge from sustained and disciplined practice. Etmanski underscores this developmental quality, stating "*social innovation is enlightened by who we are – by character, not technique. The conviction of today's social innovators arises from their emotional and spiritual maturity.*"[16]

Complexity offers a vital frame for social innovators. Those seeking social change, according to Westley, Zimmerman & Patton, "*can use the insights that come from complexity theory to increase the likelihood of success.*"[17] But insight alone is insufficient, for according to Westley & McGowan, those leading transformative social innovations habitually display a deep sense of purpose along with the capacity to engage conflict, shadow, paradox and ambiguity generatively.[18] Of particular importance are qualities such as tenacity, risk tolerance, selflessness and self-awareness. This is underscored by Omer who notes that our capability to engage creatively with complexity grows as we ourselves develop. He suggests that leaders need to embody five distinct qualities if they are to effectively participate in the transformation of complex challenges. These are *negative capability* – our capacity to engage uncertainty creatively; *imaginal capability* – the vital bridge between our internal and external realities; *perspectival capability* – our ability to see from multiple viewpoints; *autopoetic capability* – our

capacity for creative self-organization and *collaborative capability* – our ability to act creatively with others. Taken together, these five capabilities give rise to what he calls *complexity capability*.[19]

The importance of such capability increases as the external context grows more complex and challenging. Patten describes this historical moment as being one of '*crisis and fragmentation*' where the unravelling of existing patterns and institutions is leading to growing confusion and incoherence across all domains. In such a climate, he suggests, the capacity of changemakers to not only *see* but *relate to* and *act from* a deeper underlying wholeness and connectivity becomes "*a truly subversive and revolutionary act*".[20] This perspective is only heightened by the current global pandemic which Noda suggests is inevitably leading to a "new normal."[21] This new normal, according to Chima and Gutman, is characterized by perpetual, pervasive and exponential change. Effective leadership, they state, "*will be defined by the ability to navigate this new reality.*"[22] They describe this as *sapient leadership* which embodies qualities of authenticity, humility, and vulnerability, and builds the necessary trust and psychological safety required for shared learning.

There is a growing focus on these qualities across the broader leadership research literature. Owens, Johnson & Mitchell examined the significance of just one of the qualities identified by Chima & Gutman - humility – on team performance in corporate settings. They found that the *expressed humility* of a leader was a predictive factor in the capacity of their team to learn stating "*humble leaders foster learning-oriented teams*". [23] It's a striking finding. If collective learning is indeed the vital quality that enables us to respond to critical adaptive challenges, then leadership humility becomes a critical question for all of us. But here's the thing. We've never seen a single course on how to become more humble offered by any social innovation workshop, business school course or leadership training program! Indeed, it is almost ubiquitous in the leadership literature to find extensive lists of inner qualities that are exhibited by effective 'new paradigm' leaders – qualities such as empathy, humility or uncertainty tolerance. But it's rare to find any substantive discussion of what it actually takes to develop such qualities and apply them to real world settings. At the Wolf Willow Institute, we recently reviewed 167 leadership programs across North America and internationally, 63 of which were explicitly focused on social innovation and systems change. [24] And while many of them included 'inner' work, it was rare to find a well-integrated and clearly articulated pedagogy intended to cultivate the 'interior condition'.

The focus is all too often 'learning about' rather than 'training for'.

New Leadership for Systems Transition – The Positive Deviants Fellowship

As educators, we believe that we can make a meaningful contribution by supporting social innovators through an extended developmental journey that fosters whole-person learning. [25] For just as complexity requires a different kind of leadership, social innovation requires a different kind of learning. What follows is a broad overview of a programmatic learning innovation we are experimenting with at the Wolf Willow Institute called the *Positive Deviants Fellowship* that is

intended to cultivate the skillful leadership required for guiding systems transition. The Fellowship is offered at no cost to a small cohort of participants working at the front lines of systems change. Over the course of 12 months, fellows participate in four learning immersions and two optional electives (around 30 days in total); between each immersion, there is a steady rhythm of personal coaching, systems mentoring, online content and supported personal practice. Following the program, fellows become part of a curated network of like-minded practitioners dedicated to systems change and inner work.

The Fellowship's name is inspired by the concept of *positive deviance* that will be familiar to many social innovators.[26] The concept reminds us to be curious about outliers – the people who succeed against the odds and outcomes that deviate in a positive way from the norm – and to seek out and scale the patterns of emergence, wisdom and possibility already alive within any system. It prompts us to focus on what's working rather than what's missing or broken, to recognize that sustainable change invariably comes from within, and to remain perpetually curious, respectful and humble. Above all, it reminds us to embrace difference and diversity as a vital community resource.

The Positive Deviants program framework is a bricolage of approaches to systems learning that we hope will create some valuable and contextually relevant outcomes for social innovators. We hold our design here lightly with a learning mindset ourselves, eager to be in conversation with other educators, capacity builders, and learning initiatives that are holding similar questions and hypotheses. The program design is guided by four core principles:

1. **In systems learning, context is as important as content**. We approach systems learning with a systems lens and begin with the assumption that the answers to critical challenges are already alive in some way in the socio-cultural systems they impact. Systems learning happens over time and in *relationship*. A relational systems approach is alert to the risk of replicating patterns of harm and it supports learners to build a richer relational ecology that can support them and their work long term.[27] When approached skillfully, communities are often the best teacher.

2. **Effective systems learning is radically holistic.** It is a mutual journey that necessarily blurs the distinction between 'learners', 'practitioners', 'communities' and 'educators' - and invariably requires elements of *unlearning* from all. Neuroscience and Indigenous tradition alike remind us that we must integrate multiple modes of learning to catalyze multiple ways of knowing. And it recognizes that healing is often a vital element of learning. It engages the imagination, heart, body and soul just as much as the cognitive mind. A holistic pedagogy evokes multiple sensibilities and incorporates elements like somatic coaching, contemplative disciplines, expressive arts, consciousness-shifting practices, deep imagery and nature-based learning with more familiar leadership and system change pedagogy.

3. **The future of systems learning is both high tech & high touch.** We have to remember that nature is the greatest teacher even as we learn to use digital platforms more

creatively. This invites us to intentionally design learning experiences where the natural world can be both classroom and teacher. Land-based learning not only grounds our practice in place; it offers a direct experiential window into the complex relational systems we seek to engage. At the same time, emerging technologies – from systems mapping software to the potential for AI and quantum computing to offer predictive insight in complex fields – along with the rapid convergence of the human and digital worlds, are part of the landscape that social innovators must navigate.

4. **Effective systems learning is developmental.** Capacity development is accelerated through our conscious and sustained participation in *transformative learning* – the processes that we use to examine and expand our understanding of ourselves and the world around us. Such learning is multi-modal and requires sustained *practice*. We also believe that a truly transformative learning pedagogy is one that places *Mystery* at the center. We understand ourselves not as educators with all the answers, but as students of and co-guides with the unknowable, profound nature of change.

Conclusion

Social innovators are committed to building a flourishing future for all. It is a task that is both *systemic* (building sustainable patterns of culture) and *developmental* (building mature patterns of human consciousness). But above all, it is a task that requires us to engage in and facilitate *learning*. For learning is surely the heart of all social innovation. The Positive Deviants Fellowship is a learning initiative that holds a central question shared by all social innovators; how do we best support those who have dedicated their lives to changemaking? As such, while this is our best *current* description of the Fellowship – it will certainly change as our understanding evolves. We approach this work as learners and understand this initiative to be just one node in a much wider network of educational innovations. We welcome connection and conversation with all fellow travelers who are not only deeply committed to evolutionary change but equally committed to finding the most skillful and effective way to bring about such change – even if it requires significant personal change within themselves.

Bios

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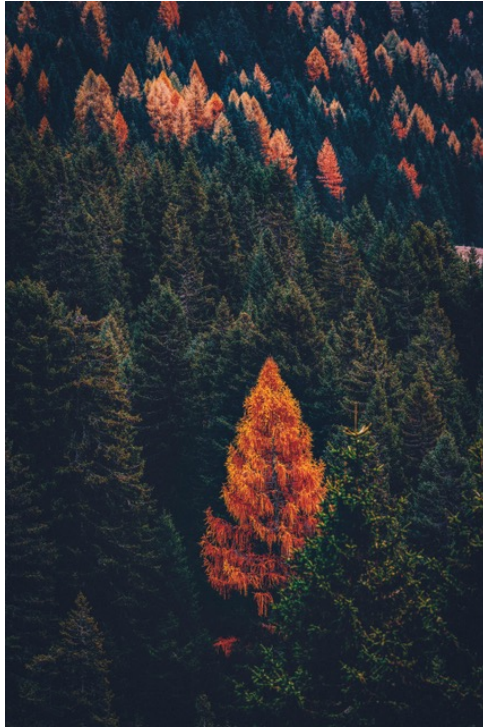
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