When Bees meet Trees
How large social sector organisations can help to scale social innovation
By Owen Jarvis and Ruth Marvel
“Social change depends on alliances between what could be called the ‘bees’ and the ‘trees’: the bees are the small organisations, individuals and groups who have the new ideas, and are mobile, quick and able to cross-pollinate.

The ‘trees’ are the big organisations - governments, companies or big NGOs - which are poor at creativity but generally good at implementation, and which have the resilience, roots and scale to make things happen. Both need each other.”

Mulgan et al, 2006
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This research was inspired by the growing interest, and investment, in social innovation in the UK and internationally. By social innovation we mean new ideas that, when applied, work to generate social value and drive changes in established culture, behaviours or organisational systems.

Innovation takes different forms and can be incremental, sustained or radical in its impact; it can take many years to recognise the true impact of social innovation. More often than not, it is not about completely new ideas, but the application of existing ideas to new problems and contexts. Some well-known examples include the Open University, direct payments in social care, microfinance, the Big Issue and Rapid SMS.

While there is always a need to develop new and better approaches to tackling social problems, arguably the bigger challenge is to get those that work to a scale where they can make the greatest possible difference.

“Solutions to many of the world’s most difficult social problems don’t need to be invented. They need only be found, funded and scaled.”

Judith Rodin, President of the Rockefeller Foundation

This paper argues that large charities, housing associations and other established social sector organisations could play an important role in helping social innovations scale. While there is a lot of focus on the role of business and the public sector in scaling social innovation, we believe large social sector organisations have a lot to offer too. But, to date, their part has been largely overlooked.

There has been significant progress in developing more support for early stage social innovators in the UK and internationally. The increasing number of incubators, accelerators and funders for social innovation such as NESTA, UnLtd and Hub Launchpad, alongside early pioneers such as Ashoka and the Young Foundation is testament to this. But, the next stage of the ‘pipeline’ that is needed; help to scale, mainstream, and maximise the social value of these innovative ideas, is not as developed. It is in this space that we feel larger social sector organisations can add real value.

“We are built for scale. We have 1,300 staff in 150 countries. We aren’t good at early stage innovation but we have the relationships, networks and expertise to be a great scale partner.”

Large social sector organisation, 2013

This paper builds on the idea that social change requires different actors to play different but complementary roles. These roles have been compared to an alliance between the ‘bees’ and the ‘trees’.

Executive Summary
“...bees are the small organisations...mobile, quick and able to cross-pollinate. The ‘trees’ are the big organisations - governments, companies or big NGOs...which have the resilience, roots and scale to make things happen. Both need each other.”

Mulgan et al, 2006

This paper asks why “bees and trees” in the social sector rarely join forces to scale good ideas that work, and how it could happen more.

Research approach

Our research took the form of a literature review, interviews with 31 senior staff from social sector organisations, and discussions with 49 individuals in total. These were a mix of large social sector organisations (charities and housing associations with annual turnovers between £5m and £100+m); social innovators and social start ups; and the intermediaries that seek to support them (including social investors, trusts and foundations and incubator and accelerator programmes). We asked them how they sourced new ideas; how they plan for scaling new ideas; if, and how, they sought collaborations or partnerships, and what would help them do this more. We then tested the emerging themes with representatives of 25 organisations who are actively involved in social innovation at an interactive workshop on 10th July 2013. We gathered follow-up views and insights from 10 additional individual thereafter.

Research findings

Literature on social innovation is underdeveloped. However, the theoretical work that has been done points to a number of important roles that larger social sector organisations are well-placed to play. Many involve formal business partnerships such as investment, mergers, or franchising. However, the nature of social innovation means that political, economic, legal and cultural changes also play a key role in enabling social innovations to take hold and disrupt the established order. The need for ‘institutional entrepreneurs’ who can create the social, political and economic conditions in which new innovations can thrive is therefore also important. Effective innovation also relies heavily on ‘cross-pollination’, applying ideas from one area to problems in another, this underlines the importance of effective connections between different organisations and sectors.

The literature also highlighted the challenges facing large, established organisations in organising themselves for innovation. Large and small organisations need each other to thrive, and “bees and trees” each play important roles that the other cannot, one strong in methods, management and scale; the other energetic and flexible in generating new opportunities. It is therefore important that organisations in the social sector understand their respective strengths and play to them, with the consequence that some organisations may need to fundamentally rethink the roles they play in the innovation eco-system.
Barriers and opportunities

Our interviews and workshop identified a range of barriers to, and opportunities for, collaboration between large social sector organisations and social innovators. They can be grouped under three themes:

Culture

Both sides have powerfully different cultures that are necessary for scaling innovation, but can hinder collaboration. We found many social innovators could see the benefits of strong relationships with large social sector organisations working in their field to help scale their ventures. Amongst large organisations there is also increasing interest in innovation, external ideas and partnerships, and a growing realisation that they need to look beyond their walls for new solutions to social challenges.

Barriers to collaboration came in the form of stereotypes of each other, insularity, risk aversion, and reactive versus proactive approaches to innovation. Despite organisational structures that are set up for operational activity larger social sector organisations often perceive themselves as innovative bees, rather than resilient trees, a perception which can obstruct effective partnerships with innovators. For large organisations already involved in collaborations around social innovation the importance of effective leadership, and embedding collaboration through organisational strategy and business planning emerged strongly. We also found that larger organisations are more likely to need external “permission” to play new types of roles and engage in innovation, especially where projects involved risk of failure. Intermediary organisations, funders, social sector leaders, regulators and policy makers all have powerful roles to play in giving this permission, and incentivising larger social sector organisations to get involved.

Connections

Large social sector organisations appear to have little engagement with or knowledge of the social innovation world. In turn the social innovation world appears to have largely overlooked, in some cases consciously, the existing established social sector as a route for scaling social innovation. A major factor in this is that both worlds simply fail to connect and meet. There is a clear need for more physical and virtual meeting places and the encouragement from leaders in these sectors to use them. There is also a lack of ‘expos and trade fairs’ for proven social innovations that can be used to showcase new products, services and technology and attract scale partners who are looking for new ways to support their organisational missions.

The research also demonstrated the need for more effective bridge-builders between the two sectors that can help forge meaningful and appropriate partnerships at an early stage. These include more proactive intermediaries (incubators, funders, accelerators and investors) who work to connect potential partners and invest in social innovators who have clear routes to scale; new models of accelerator and incubator programmes that engage scale partners from the outset; and a network of intrapreneurs, official and unofficial, who work within larger organisations to drive internal innovation and create the internal conditions to support it.
Collaboration

Even with the right culture and connections, finding the ways to work together remains challenging.

We found that larger organisations could play a much greater role in stimulating ‘open-innovation’ as a means of identifying and scaling new approaches to key social issues from an earlier stage. Where new ventures already exist we found that mechanisms like commercial contracts, joint-ventures, partnership agreements, mergers, acquisitions and franchising were under-used in the social sector.

For those already involved in collaborations the importance of senior leadership, permission, and the commitment to collaborations with social innovators being embedded in the strategies and business plans of larger organisations, came across strongly.

We found that being clear about the preferred mechanism for collaboration between organisations along with each organisation’s appetite for risk are important in creating the right partnerships; establishing mutual credibility and trust between partners is also crucial to effective collaboration. A strong role for funders and policy makers in incentivising such collaborations and giving public permission for them to happen also emerged.

Conclusions

Established social sector organisations have many qualities that enable them to help scale social innovation. However, at present this capacity is overlooked and under-used.

Despite organisational structures that are set up for operational activity larger social sector organisations often perceive themselves as innovative bees, rather than resilient trees, which impedes their ability to play to their real strengths. Naturally there are some exceptions to this, and while we recognise the effective internal innovation work that some large social sector organisations are doing, we conclude that most larger organisations can add more value by playing one or more of the following roles:

1. **Scale Partner**: leveraging their brand, delivery infrastructure, networks, customer base, reputation, financial resources and business acumen in a wide variety of different ways to help scale ventures that have a social impact.

2. **Social Innovation Brokers**: actively seek out new innovations, build trusted relationships with innovators and potential scale partners, and help make good ideas available to other organisations, policy makers and funders in a specific field.

3. **Institutional Entrepreneurs**: create the environment in which promising social innovations can flourish e.g. through advocating for legislative policy or practice change, promoting new innovations to commissioners, and supporting cultural acceptance of new ways of meeting social needs with end-users and the public.
Collective Impact Convenors

We also identified a need to move beyond simple one to one partnerships in order to have a greater impact on more complex social challenges. This highlighted the need for greater use of collective impact networks as mechanisms to help promote impactful collaboration between multiple organisations on specific social issues.

**Bees and Trees: improving the pollination process**

Importantly our paper advocates three practical approaches that can help improve collaboration between “bees” and “trees” to scale social innovation.

Established social sector organisations need to understand the various roles they can plan in supporting social innovation and choose one that best fits their abilities, social mission and aspirations.

We advocate all parties carefully selecting the right types of partners to work with. This involves a degree of self-awareness – understanding capacity for risk, and openness and interest in collaboration. Both sides can save time and increase chances of success by being aware and open of their own style of collaboration. Staff in larger organisations will need to be specifically trained or recruited for their skills in managing innovation and collaboration.

We feel there is a significant opportunity for larger organisations to get involved in the current wave of social innovation incubators/accelerator programmes. This can include setting challenges and problems for innovators to respond to all the way to becoming investors or scale partners when social innovators graduate from these intensive programmes.

**Recommendations for action**

Large social sector organisations have an important role to play in helping to scale social innovation, but they need to play to their strengths.

To do this, three things need to happen:

1. Culturally the social sector needs to recognise that individual ‘silver bullet’ social innovations are rare, and support more, coordinated ‘network’ innovation that tackles social problems from multiple angles and using multiple levers simultaneously.

2. Large charities and housing associations need to look outside for new innovations and ideas, recognise they can add more value to social innovation as scale partners, brokers and institutional entrepreneurs, and reconfigure themselves to play these roles.

3. Funders, policy makers and intermediary organisations that exist to promote and scale social innovation need to recognise the potential of larger social sector organisations to scale social innovation and find ways to incentivise and support these organisations to play these new roles.

The report that follows discusses these themes and outlines these roles in further detail.
Practical approaches for better collaboration

We identified three practical approaches that can help improve collaboration between “bees” and “trees” to scale social innovation.

A. Choose the right role/s

Organisations involved in social innovation need to understand the different roles they can play in supporting social innovation and choose those that best fit their structures, strengths and social mission. See page 44 for a list of roles.

B. Choose the right partner/s

Organisations need to select the right types of partners to work with. This involves a degree of self-awareness – e.g. understanding your capacity for risk, interest in collaboration and the degree of organisational control you require. Both sides can save time and increase chances of success by being aware of their preferred method of collaboration. Staff in larger organisations will need to be specifically trained or recruited for their skills in managing innovation and collaboration. See page 48 for help in deciding which partners to work with.

C. Get involved earlier

There are significant opportunities for larger organisations to get involved in the current wave of social innovation incubators/accelerator programmes. This can include setting challenges and problems for innovators to respond to, through to becoming investors or scale partners to social innovators that graduate from these intensive programmes. See page 49 for an alternative incubator model that addresses scale from the outset.

3 Module B: Growing, scaling and spreading. Open Workshop, Building skills for Innovation website, NESTA
   https://openworkshop.nesta.org.uk/content/6-growing-scaling-and-spreading
5 For a list of interviewees and event participants see Appendix 1
6 Mulgan, Ali, Halkett and Sanders. 2007. In and Out of Synch. The challenge of growing social innovations. NESTA.
9 Seelos and Mair. 2012. What Determines the Capacity for Continuous Innovation in Social Sector Organisations, Stanford University Centre for Philanthropy and Civil Society
10 Nesta Policy briefing SI/18, Social Innovation: New Approaches to transforming public services, 2008
   http://voices.mckinseyonsociety.com/creating-large-scale-change-not-can-but-how/
As authors, our interest in this topic stemmed from our common frustration at the social sector’s poor track record on effectively collaborating to tackle social challenges.

Owen was motivated by years of experience as a social entrepreneur developing meaningful partnerships with large charities and housing associations. For Ruth a career inside large charities revealed the challenges of innovating within established, delivery-focused organisations.

The aim of our research is to open up what we believe is a neglected area for social innovation; the role of large social sector organisations in helping to scale social innovation. We would like to thank everyone who participated in the project and supported us to get to this point. Your generosity and candidness made this a fascinating and inspiring topic to research. Any errors or omission are our own.

In the paper that follows we explore how the social sector can do more to help itself create the social impact and value it aspires to, by collaborating and combining its existing skills and assets more effectively. We identify some barriers and opportunities, and suggest some practical tools and models that could help leaders across the social sector do this better in practice.

Though undoubtedly a broad church, the social sector is united by a set of values and social missions that, carefully coordinated and directed, have the potential to be incredibly powerful. We argue that to achieve this it is necessary to fundamentally rethink the roles different organisations play in this eco-system so we can create the change we all seek. This will be challenging and painful at times, but we cannot afford not to.
Why collaborate to scale social innovation?

“Governments and other non-market institutions have long suffered from the innovation malaise of top heavy bureaucracies. Today these institutions have an opportunity to fundamentally alter the way they cultivate and promote good ideas.”

Johnson, 2011

In recent years there has been an explosion of interest in social innovation with governments, trusts and foundations and private companies increasingly keen to invest in social innovators, particularly technology start-ups. Social innovation is increasingly heralded as the answer to our most intractable social problems and tens of millions of pounds are now being invested in social innovation in the UK every year, rising to billions globally.

While social innovation is still viewed with scepticism in some quarters, there is no doubt that against a backdrop of demographic pressures, environmental change, global economic downturn, and the largest public service cuts for generations there is an increasingly urgent need to find new, more (cost) effective, ways to tackle some of our most ‘wicked’ social problems.

Innovation is, and always has been, crucial to this process.

But behind the hype, there is growing concern that supporting and investing in early stage social innovation isn’t enough to get good ideas that work to a scale where they can make a real difference to these ‘wicked’ problems.

“There is way too much emphasis on innovation and not nearly enough on implementation”

Kevin Starr, Stanford Social Innovation Review

“$500m - $1bn a year is being invested in a rapidly growing and increasingly crowded market of social entrepreneurship in the US West Coast alone. Very few of the ventures in this space reach scale.”

Large Social Sector Organisation, 2013

While academic literature on social innovation is underdeveloped, the theoretical work that has been done suggests that there should be an important role for collaborations between large social sector organisations and social innovators in scaling social innovation. In the following chapter we outline some of the benefits of collaboration between large and small social sector organisations.
Bees and Trees need each other

This paper builds on the metaphor of “bees and trees” originally coined in the paper ‘In and Out of Synch.’ It argues that large and small social sector organisations need each other to thrive. “Bees and Trees” each play important roles that the other cannot. Collaboration helps to build on their respective strengths and compensate for their weaknesses, one strong in methods, management and scale; the other energetic and flexible in generating new opportunities.

Large established organisations generally struggle to innovate successfully as the bulk of their energy and efforts are spent keeping their large operational processes running efficiently. On the other hand social innovators and start ups while good at invention, are weaker at organisational development and management, and struggle to access the right markets, advice, networks and investment that they need to scale, sometimes creating a vicious cycle of launch and fail.

“The skills of the inventor are rarely those of the integrator.”

Khan and Joseph, 2013

Social innovators can provide an injection of fresh perspectives, new ideas, and new applications of old ideas, that have the potential to improve or sometimes radically disrupt, established ways of tackling social problems. Many have expertise in new and emerging technologies that larger organisations lack, and have access to other sectors and networks that enable them to cross-pollinate ideas and make unlikely, but powerful, connections.

Established social sector organisations on the other hand can provide innovators with access to crucial networks, supply chains, potential customers, finance, and advocacy capabilities that help create the demand and conditions for innovation to thrive.

Furthermore, it remains the case that many social innovations do not have a customer that can afford to pay for them. The commercialisation of the social sector has been a noticeable trend in recent years but, despite the enthusiasm for social enterprise, social businesses and social investment, many social needs are still not fundable and public spending cuts are exacerbating this. One important role of large social sector organisations that have the capacity to generate unrestricted income through fundraising, or other activities, could be to invest in innovations that no one else will pay for.

Innovate or die

There are clearly compelling reasons for large organisations to keep up with the times, and in recognition of their social mission, to play a leadership role in driving change for their beneficiary groups. The world is changing rapidly, and this is placing pressure on established social organisations to remain relevant and impactful. To manage this, a continuous integration of novelty and change is necessary.
Finding better solutions

Ultimately, individuals and organisations with a social purpose are interested in one thing: finding better responses and solutions to the social disadvantage or challenge that they exist to tackle. For some this focus even extends to seeking to put themselves out of business.

Studies of innovation show that, more often that not, it is not about completely new ideas, but the application of existing ideas to new problems and contexts. Therefore, the question of how to access new thinking, from outside your own sector or thematic interest area, is of particular relevance to social innovation.

“In many cases solutions came from solvers in fields not ostensibly connected to the problem”

To this end, collaborations between large established social sector organisations and social innovators, are a way of attracting new ideas, new thinking and new perspectives on old problems. Approaches like Open Innovation, “hack” events and competitions are beginning to gain momentum in the social sector and have the potential to engage a much wider group of individuals and networks in addressing significant social problems.

Kill, compete, or collaborate?

In most sectors, in both the social and private sectors, there is usually already one or more dominant established organisations in place. Sooner or later the key question innovators face is what to do about them? There are a number of choices: displace or destroy, ignore and perhaps leapfrog them, or collaborate.

Innovators in defining their problem and designing their solutions may feel that in changing the status quo, dominant organisations are so entrenched as part of the problem that collaboration is impossible. Even in this case, the reality is that innovators, if successful in starting to grow their venture must expect resistance, and potentially difficult opposition from larger and better-resourced organisations. Some form of engagement, and potential collaboration, with existing organisations is therefore likely to be needed.

Mitigating risk

Finding innovations from scratch is difficult and inherently risky, and involves prototyping and failure on route to success. One approach to managing this risk is to find and partner with social innovators who can conceive, develop, try and test new ideas without putting the organisation as a whole at risk. This is an attractive option for larger organisations that wish to support innovation but need to manage the associated financial and reputational risks.
Collective action to tackle “wicked” problems

Drawing upon Matthew Taylor’s recent work we can see that the model of “bees and trees” plays into a wider debate on the direction of society. Many of these problems are highly complex and cannot be unravelled through actions of organisations, individual action, or goodwill on their own. This requires reconciling our competing instincts of hierarchy, individualism and solidarity (see diagram below).

This has been difficult. Whilst technology has helped boost our means of individual expression and choice it hasn’t led to enriching collective action. Large organisations are hierarchical and often crush the spirit of creativity and contribution of individuals. Trust in institutions such as government, police and banks have been eroded when they have followed self-interest over commitments to solidarity with wider society.

The idea of “bees and trees” illustrates ways in which these competing tensions in can be overcome. If social leaders can harness the sector’s deep roots in shared purpose and solidarity, this can provide the potential glue to make collaboration possible. The urgency to achieve this is emphasised by various “wicked” social problems that we face, from sustainability to ageing.

Diagram: Sources of Power in Society

“The first, the downward power of hierarchical authority associated most strongly with the state. Second, the lateral power of solidarity and shared values generally associated with the idea of community. The third, the upward power of individual aspirations, which tends to be associated with markets.”
17 Mulgan, Ali, Halkett and Sanders. 2007. In and Out of Synch. The challenge of growing social innovations. NESTA.
21 Khan,Z and Joseph.K, 2013, Embracing the Paradoxes of Innovation, Stanford Innovation Review
23 Boudreau and Lakhani 2009, How to Manage Outside Innovation Competitive Markets or Collaborative Communities
While political interest, and investment, in social innovation is increasing rapidly, our theoretical understanding of how it works in practice is still relatively poor. The emerging nature of this field means that the rules are not yet written and there is still huge opportunity to develop and test new approaches.

To this end we set out to investigate and understand the opportunities, and barriers, associated with collaborations between large social sector organisations and social innovators, the ‘bees and the trees’, and the role intermediary organisations could play in incentivising and supporting these. Our interviews highlighted three key themes: culture, connection and collaboration.

Our research took the form of a literature review, interviews with 31 senior staff from social sector organisations, and discussions with 47 individuals in total. These were a mix of large social sector organisations (charities and housing associations with annual turnovers between £5m and £100+;m); social innovators and social start ups; and the intermediaries that seek to support them (including social investors, trusts and foundations and incubator and accelerator programmes). We asked them how they sourced new ideas; how they plan for scaling new ideas; if, and how, they sought collaborations or partnerships, and what would help them do this more. We then tested the emerging themes with representatives of 25 organisations who are actively involved in social innovation at an interactive workshop on 10th July 2013. We gathered follow-up views and insights from 10 additional individuals thereafter.

What we found was that a number of barriers currently prevail which can be clustered around the themes of culture, connection and collaboration. However, we discovered a range of examples of how innovation has prospered through “bees” connecting with “trees” and the workshop identified a number of ideas and recommendations as to how this can be supported and incentivised further. Recommendations for action are included at the end of the discussion of each theme.
Theme 1: Culture

Culture
Both sides have powerfully different cultures that are necessary for scaling innovation, but can hinder collaboration. We found many social innovators could see the benefits of strong relationships with large social sector organisations working in their field to help scale their ventures. There is a burgeoning interest in innovation, external ideas and partnerships amongst large organisations and a growing realisation that they need to look beyond their walls for new solutions to social challenges.

Barriers to collaboration came in the form of stereotypes of each other, insularity, risk aversion, and reactive versus proactive approaches to innovation. Despite organisational structures that are set up for operational activities, and the practical obstacles to balancing innovation with business as usual, larger social sector organisations often perceive themselves as innovative bees, rather than resilient trees, a perception which can obstruct effective partnerships with innovators.

For those already involved in collaborations the importance of leadership, strategy and permission to fail in making this possible emerged strongly. We also found that the more disruptive the innovation the greater the cultural resistance it would be likely to face. Many larger organisations appear to need external “permission” to play new types of roles and engage in innovation. Intermediary organisations, funders, social sector leaders, regulators and policy makers all have powerful roles to play in giving this permission, and incentivising larger social sector organisations to get involved.

Stereotypes
Without regular connection points a number of stereotypes and barriers have emerged.

“Most of the stories we hear from our start-ups about big charities are bad – I can think of a long list of stories of start-ups where they’ve gone to a big charity thinking that they could be able to help them and come away feeling snubbed or worse just strung along.”

Intermediary

“We’re about filling the gaps and meeting the needs of local communities. It’s about what works. We’re not about these “flash-bang-wallop” new ideas”

Large social sector organisation, 2013

Larger organisations can develop insular cultures that don’t encourage innovative behaviours and are very focused on internal activities, impeding their ability to look externally for new ideas. This can be compounded by the internal perception that they are innately innovative and so don’t need external stimulus.
“There’s a reason why large complex organisations, whether corporate or NGOs have to develop things from the inside – it’s just too complicated not to.”

Large social sector organisation, 2013

Many support agencies for social innovators also do not consider large social organisations as viable partners.

“Most charities have been run on a shoe-string and are used to outmoded business thinking, to be blunt, I think the world’s moved on and become more networked, more connected and I think charities are on a bit of an out-dated 20th century business model.”

Intermediary, 2013

I am aware of these [intermediary] organisations but I think they lack ambition for big charities. UK PLC’s view of charities as old fashioned, benevolent and ‘nice’ means there are low expectations of what charities can offer. We could do much more.”

Large social sector organisation, 2013

Approach to risk

Developing new products and services is risky and many new ideas are destined to fail. Hence the innovation mantra ‘fail early, fail often’. But risk, in many forms, was a really strong theme for our interviewees. Innovation literature tells us that “non-profit organisations, along with government and the public sector, are generally more risk averse than the private sector who must be willing to take risks in the hope of obtaining a better return on their owners’ investment.”

Hull and Lio, 2006

Reputational risk, financial risks, and risks to beneficiaries all emerged as key concerns that affected the willingness of larger organisations to embrace new ideas, and to collaborate with external partners.

“We’re not great at change, internally we tend to see change as risky, worry about what the regulator will think, what will tenants think, perception is that most external ideas might fail.”

Large social sector organisation, 2013

“We have a history of being innovative; we’ve developed a number of products that have had a big impact.... But, we were bad at taking risks and failing. This was driven by the fact that our main donors are Governments who don’t want to take risks with taxpayer’s money, they want safe bets.”

Large social sector organisation, 2013
Investors in social innovation also place great priority on risk-management. Many of the innovators we spoke to had received funding and support from multiple intermediaries as their association with a previous funder made them a safer bet. Intermediaries were reluctant to advise investees on how best to scale or who to work with, but interestingly collaborations with reputable organisations were seen as a real benefit in de-risking investments.

“We don’t advise [investees] on the best route to scale - the organisation themselves has to decide this. Corporate advice is too risky, there are insurance issues and it could backfire on us if a venture subsequently fails.”

Intermediary, 2013

However, associations with larger, established social sector organisations helps to de-risk ventures for investors.

“If you’ve got a social venture working with a large charity and one that isn’t I know which one I’m going to back”

Intermediary and funder, 2013

Some organisations were taking steps to mitigate risk and create boundaries around riskier activities. Interviewees from organisations that were actively engaged in innovation also cited strategy, governance and leadership as key factors in enabling organisational risk taking.

“There need to be guidelines on taking risks that set out what’s acceptable. Our venture fund is designed to cordon off money that can be used for riskier activity; you wouldn’t spend the whole organisational budget on this; that would be madness.”

Large social sector organisation, 2013

“Trustees that are willing to do whatever is necessary to meet the needs of their beneficiaries - they need courage and not be held back by traditional approaches or what everyone else is doing. Trustees with gumption are the most important factor.”

Large social sector organisation, 2013

“Our whole strategic approach is focused on innovation and system change; it’s why we exist so there’s no argument about it.”

Large social sector organisation, 2013
Pro-active or reactive?

We found that larger organisations tend to seek new ideas in different ways to emerging ventures. Social innovators tend to be pro-active, focusing on a specific problem or issue and building a solution to tackle it.

Larger organisations tend to be more reactive and focused on protecting their established activities – scanning the horizon for policy changes, changes to public service contracts, trends in donations. Once they see the wind of change they then seek new ideas, approaches, people and partners who will help them mitigate the impact or take advantages of the new conditions.

“The innovation unit was set up to support business growth to enable us to run new projects and test new approaches. It was driven by the need for new sources of income to offset public sector cuts.”

Large social sector organisation, 2013

“Given that local authorities don’t have money to pay for it anymore we have to go back to them and offer them new solutions, so that they can keep funding us.”

Large social sector organisation, 2013

Being reactive aids organisational survival, but risks short-term thinking, following other people’s agendas and importantly – following the agenda of funders or commissioners over the needs and priorities of communities being served.

“Staying focused on what your beneficiaries want is vital. I think there comes a point for most large charities where the continued existence of the organisation itself becomes more important than meeting the needs of their beneficiaries.”

Large social sector organisation, 2013

However, although culture is notoriously difficult to change there are increasingly routes into innovation for larger organisations, whilst keeping to what many of them do best – managing services and products at scale.

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Recommendations

**Larger social sector organisations** should consider doing the following:

1. Engage with social innovation, and commit at a leadership and business planning level to trying to support social innovation reach scale.
2. Recruit and train staff in managing innovation, forming and managing partnerships, working with organisations of different sizes.
3. Identify the most appropriate role/s for their organisation to play in the innovation eco-system (see Practical Tools section), learn from those already doing it, and proactively network and horizon scan for relevant emerging social innovations that they could partner with.
4. Where required, engage with intermediaries, funders and policymakers to design suitable support systems to help them realise these partnership in practice.

**Funders, intermediaries and policy makers** should consider doing the following:

1. Educate organisations in the innovation eco-system about the different roles they can play and help them identify the most impactful role/s for them.
2. Provide guidance on best practice in managing innovation projects alongside business as usual, with a particular focus on managing risk.
3. Publicise and celebrate examples of these types of partnership in order to incentivise and give ‘permission’ to others to follow suit.
Theme 2 – Connection

Connections

Large social sector organisations appear to have little engagement with or knowledge of the social innovation world. In turn the social innovation world appears to have largely overlooked, in some cases consciously, the existing established social sector as a route for scaling social innovation.

“Big charities aren’t aware and don’t know we exist. We want to wake them up – they’re all so busy and there’s a question of how you find them.”

Innovator, 2013

A major factor in this is that both worlds simply fail to connect and meet. There is a clear need for more physical and virtual meeting places and the encouragement from leaders in these sectors to use them. There is also a lack of ‘expos and trade fairs’ for proven social innovations that can be used to showcase new products, services and technology and attract scale partners who are looking for new ways to support their organisational missions.

“The greatest threat to innovation is an information silo. Free and open information exchange and conversation is the fuel that drives innovation in organisations; but all too often, information is walled off in divisions, functional areas, or geographies.”

Doss, 2013

Diagram: Where are new ideas sourced from?

The further afield the search, the more likely it is to find innovative/new solutions to problems.
The research also demonstrated the need for more effective bridge-builders between the two sectors that can help forge meaningful and appropriate partnerships at an early stage. These include more proactive intermediaries (incubators, funders, accelerators and investors) who work to connect potential partners and invest in social innovators who have clear routes to scale; new models of accelerator and incubators programmes that engage scale partners from the outset; and a network of intrapreneurs, official and unofficial, who work within larger organisations to drive internal innovation and create the internal conditions to support it.

**Awareness**

Whilst there was some curiosity and interest amongst our interviewees, few senior managers and leaders from large social sector organisations had significant knowledge of, or connection with, the organisations in the innovation world.

> “Big charities and service providers need more exposure to start-ups and founders and need to know the culture, to understand them better, and vice versa.”
> **Intermediary, 2013**

**Connection points**

Our research identified a lack of physical and virtual meeting places where the two worlds could meet, identify common agendas and potentially forge new collaborations.

> “One of the big failings of social sector funders is that they often don’t help you get (and meet) clients and contracts.”
> **Innovator, 2013**

> “Everyone I speak to in this area says they are desperate for access to networks of advice, support, customers.”
> **Intermediary, 2013**

> “It’s quite hard to network with them [large social sector organisations] – unlike in business – I do a lot of networking with tech companies, but there’s nowhere where you can go and all meet up in one place.”
> **Innovator, 2013**

There is also a lack of more formal ‘expos and trade fairs’ for social innovations that allow them to showcase more developed ventures to a wider audience and meet potential scale partners.

> “We try to act as an honest broker, helping to introduce investees to future funders or investors - we make lots of introductions. But, there’s not really a shop window for social innovation that lets possible partners see what’s out there.”
> **Intermediary, 2013**
Connectors and Intrapreneurs:

Even where connections are being made, there still remains the need for proactive bridge-builders to connect organisations with relevant innovations. Some interviewees were also of the view that some larger organisations needed more than just encouragement to get out and connect with others in the sector.

“It’s the responsibility of larger charities to network and build partnerships, if they don’t do it willingly, as support organisations and funders we should force them to.”

Intermediary, 2013

Our interviews suggested that there was a need for more focus on making these connections, identifying large organisations and social innovators with common agendas who may be able to collaborate for greater impact, and encouraging them to do this from the outset.

“There should be someone who is horizon scanning or scouting around for small organisations those big providers could work with – most big tech companies will have a role, a member of staff who will do that – Google have a whole separate organisation.”

Intermediary, 2013

A key role emerged within large social organisations to help promote and manage collaborations and innovation, “bridge-builders” or unofficial ‘intrapreneurs’ (entrepreneurs working within organisations, sometimes outside management authority). Intrapreneurs often work under the radar or in their spare time but with a clear sense of the organisation’s mission. They are highly skilled in getting things done through internal culture and can provide entry points for external partners.

“Reasons an idea won’t get accepted? Timing, capacity, strategic priorities, things are a lower priority. But if you know how to navigate through an organisation it can be successful.”

Intrapreneur within a large social sector organisation, 2013

In some cases they can successfully mainstream innovation as part of the broader organisational culture.

“At first the corporate organisation ignored us, then they tried to kill us, and then they embraced us.”

Intrapreneur in a large social sector organisation, 2013
Recommendations:

Funders, intermediaries and policy makers should develop more ways to connect social innovations and organisations that can help them scale.

Suggestions include:

1. Develop 21st century coffee houses: London and the UK has a long tradition of meeting places where ideas can flow freely, and relationships and trust can be built, whether it’s a monthly drinks night, ‘un-conferences,’” or greater use of open innovation methodologies; more opportunities for the two worlds to connect up need to be created.

2. Create public showcases for social innovators seeking investment/scale partners by building on existing platforms like Nominet Trust 100 and Ashoka’s Changemakers, holding degree shows, expos, and collating new thinking, especially proven ideas, from across networks like IDEO, ideally in one site or event.

3. Invest in proactive ‘connectors’ and ‘super-connectors’ who can work across organisations and sectors in order to cross-pollinate ideas, spot opportunities for collaboration between social innovators and established organisations and encourage them.

4. Intermediary organisations that run incubators or accelerator programmes should aim to identify potential scale partners for innovations and to develop and support these relationships from the outset. See p47 for a suggested model.

5. Support the work of intrapreneurs within larger organisations by enabling them to network more effectively with each other and learn from each other. Consider establishing an ‘intrapreneur of the year’ award to celebrate the role of bridge-builders and improve the profile and recognition of these types of roles.

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30 http://www.nominettrust.org.uk/knowledge-centre/nominet-trust-100
31 http://www.changemakers.com/
Theme 3 – Collaboration

Collaboration

Even with the right culture and connections, finding the ways to work together remains challenging. Existing collaboration mechanisms like open innovation, commercial contracts, joint-ventures, partnership agreements, mergers, acquisitions and licensing were all under-used by the social sector. For those already involved in collaborations the importance of leadership, permission, and a commitment to collaborations with social innovators being embedded in the strategies and business plans of larger organisations came across strongly. Where innovation was a pet project of senior staff the chances of initiatives being derailed by middle managers with other priorities was significantly increased.

“I can’t emphasise enough the need for innovation activity to be embedded within the culture and strategy of a large organisation, if it’s not it hits the permafrost of middle management which is focused on its own targets and priorities.”

Large social sector organisation, 2013

We found that matching social innovators with the right larger partners and establishing mutual credibility and trust between them was crucial to effective collaboration. Being clear about the preferred mechanism for collaboration between organisations, and the specific roles each organisation is best placed to play, enables clear expectations to be set for all partners and avoids misunderstandings further down the line.

Equally, the need to think beyond simple partnerships between one innovator and one investor or scale partner was also clear. Many of the challenges that social innovators and large social sector organisations were trying to tackle were not addressable through one piece of technology or one product. This highlighted the need for greater use of systems thinking, collective impact networks, and open innovation as useful tools in helping to promote impactful collaboration between multiple organisations on specific social issues.

“At Rockefeller we believe that you must work with everyone. I think a good portion of our success will come from linking networks and partners from the most unlikely places and in the most unlikely way.”

President, Rockefeller Foundation, Judith Rodin

Opening Out for Innovation

Open innovation methodologies, where organisations invite external people to help them solve problems or generate new ideas, are increasingly being recognised by both the private and social sector as way to access a wider pool of innovative ideas and connect with new thinking.

“Open innovation”, is a process of opening the doors of an organisation to individuals or companies who either compete or collaborate to produce best
new solutions to thorny problems. Increasingly it is being used in the private sector too, with Proctor and Gamble’s Connect and Develop programme a well documented example. Using Open Innovation methodologies it moved beyond its 7000 in-house researchers to engage over 1.5m people across its external networks in sourcing ideas for new products. From here it builds proposals into fully-fledged commercial products and increase sales and now gets over 35% of new products from outside sources.37

Open Innovation is starting to be used more widely in the social sector too - examples include Openideo, the Nesta ‘challenge prize’ programme, Ashoka’s Changemakers programme, and the RSA’s social design challenge and premiums, amongst others.

These approaches have the potential to generate multiple responses to social problems and tackle them from multiple angles simultaneously, though it is currently more common to have one idea emerge as the ‘winner’. These all offer mechanisms that could allow larger social sector organisations to proactively seek new responses to social problems that they can help to scale.

New fora and technologies are also emerging that bring people together and allow ideas to be shared and connections made. In health Doctorpreneurs is a community of medical entrepreneurs and innovators. In the housing sector one innovation has been the development of housingcamp (www.housingcamp.org) a free unconference for people interested in how the social housing sector does “digital stuff” initiated by housing sector professionals.

Other approaches include hack-days, service design jams, un-conference styled events and open innovation competitions and apps. Apps like Spigit now provide the technology that enables organisations to set up open innovation platforms in-house making open innovation a more affordable and replicable approach. The UNHCR are using the Spigit App platform to crowdsourcing solutions to issues for refugees.38

**Understanding how different ventures might scale**

Our interviews and discussions reveal that there is a real gap in understanding as to how to scale social innovations. This is unsurprising given the lack of robust academic work in the area.39

However, support agencies are now more engaged in reviewing routes to scale, however links to established social sector organisations are still needed.40

**Trust, commitment and knowing what you want**

For a collaboration to have a chance both sides need to be clear about what they want from a partnership and to have laid the ground rules internally before looking to work with others.

> “Get all the engagement and buy-in from all the relevant people in advance before you’ve even begun to start having the external conversations, to avoid people within your organisation saying, “well I didn’t ask for that, I don’t want that, and I don’t know these people from Adam.””

*Intermediary, 2013*
Different social innovators are often looking for very different things from partnerships with larger organisations. Some wish to lead their venture and be heavily involved in its day to day running, others may want to hand over their venture to a scale partner and take a back seat, or even exit and move on to another project. Understanding each other’s motivations and vision for any partnership emerged as an important factor in successful collaborations.

“We’re not really looking to become a much larger organisation, but a lot of what we are trying to do would be economic if we were operating at a larger scale.”

Social innovator, 2013

Critically, trust is central to being able to form a strong collaboration. In the private sector, specialist brokers provide a neutral space for both parties to negotiate safely, making sure the interests of both parties are protected. A similar role may be required in the social sector.

“Small companies worry that large companies will steal their ideas, and large companies worry about being legally exposed.”

Intermediary, 2013

**Incentivising collaboration**

Some of the barriers we identified in the earlier themes such as risk aversion, insular cultures and the tendency for larger organisations to move to protect established ways of doing things when confronted with new ideas, suggest that collaborations for scale may need to be incentivised.

Funding is an obvious way to encourage different behaviours. Current funding for innovation rarely sets out to encourage established organisations to work with social innovators to help them scale, but if designed differently innovations funds such as those run by the Cabinet Office and NESTA could help to do this.

Policy makers and funders can play a role by signalling to established organisations that they have important roles to play in supporting social innovation and giving them permission and encouragement to participate. Large social sector organisations often have complex stakeholder relationships, with different groups having vastly different perceptions and expectations of them. Public encouragement from external bodies can help manage these expectations to allow organisations to engage in less traditional activities like innovation.

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33 Mulgan and Leadbeater. 2013. Systems Thinking. NESTA
40 Roundtable discussions on drafting papers on scaling social tech with Nominet Trust and guests, at “We Are What We Do”, August 2013
Below we highlight some examples of organisations that are collaborating, in a range of different ways, to help scale good ideas that work. Some are quite modest, others incredibly ambitious, but they illustrate four different types of effective collaboration between large social sector organisations and social innovators.

The examples are quite different to each other and none of these collaborations appear to have been designed deliberately to help social innovations that work to reach scale or have a greater impact. However, they provide some interesting models of collaboration for us to explore and learn from.

1. The scale partner

In the private sector established commercial companies who are seen as strong on delivery and weak at innovation, use mergers and acquisitions, franchising and licensing arrangements and supply chains to ‘access’ useful products from smaller companies.\(^{31}\)

Markides and Geroski\(^ {42}\) argue that established companies by sticking to what they are good at have skill-sets well suited to scaling up products, services and markets created by others, often realised through mergers and acquisitions of emerging ventures. They show that Microsoft, Amazon, Apple, and Google are all modern examples of companies that manage to be seen as innovative without being the first innovators, and continue to keep their innovative edge through mergers and acquisitions.

While the private sector has a tradition of looking externally for innovations that can help their businesses grow and compete, this does not appear to be the same in the social sector. The use of mergers and acquisitions is rare amongst large charities, other than to rescue organisations in financial difficulty, and social franchising\(^ {43}\) is also uncommon. However, the less commercial approach taken by the social sector, and the absence of a need to create financial returns for shareholders, mean that there are a broader range of scaling mechanisms available. So while mergers and acquisitions may be one way to act as a scale partner, this is by no means the only route open to large organisations.

Social sector organisations can also leverage their brand, delivery infrastructure, networks, customer base, reputation, financial resources and business acumen in a wide variety of different ways to help scale ventures that have a social impact.
Examples of Scale Partnerships

**Macmillan (www.macmillan.org.uk)**

Macmillan are unusual in the sector in that they play the role of social innovator, rather than large charity, selling in their innovative services to the NHS and private companies, who use their respective size and reach to take them to scale. They approach innovation by doing research, testing and piloting new solutions, evaluating these, and seeking to establish the economic benefits. Future plans include more consistently scanning the horizon for external ideas and approaches that they could apply to their own challenges. They have an effective scale-partner relationship with the NHS where they develop and then seed corn fund new interventions, establish proof of concept and then mainstream it by incorporating it into NHS services. They are using a similar model to develop a partnership with Boots to create ‘Boots Macmillan information pharmacists’ – roles in Boots stores to provide tailored information and support to customers affected by cancer.

**UNICEF (unicefinnovation.org)**

UNICEF is recognised internally for its successful innovation. Its award winning Rapid SMS open source software enables real-time data collection and analysis by connecting frontline workers to the web via basic mobile phones. UNICEF’s innovation team evolved from the work of two ‘intrapreneurs’, initially working on partnerships and web. Now a core function within the organisation, the team is focusing on UNICEF’s scale-partner potential. They are seeking to partner with foundations in the US to advise on which of their early stage innovative projects are most impactful and scalable, help social innovators plan for scale, and help scale suitable innovations through UNICEF’s own projects and in-country networks. They are also seeking to develop a mid-stage innovation fund, leveraging multi-million dollar investment from Governments and other international funders, to support innovations that need testing beyond pilot and prototype stages.

**Mencap & Insane Logic (www.insanelogic.co.uk) & (www.mencap.org.uk)**

Social entrepreneur Zoe Pedden set up her own business tech-startup Insane Logic after over 10 years working with charity Makaton. Insane Logic provides interactive mobile and online products offering innovative learning products for the early years and special needs market. Their products include MyChoicePad which uses the Makaton signs and symbol language programme – as used on CBeebies Something Special - in a highly engaging way. Zoe is partnering with Mencap to work on their portfolio of support programmes for people with learning difficulties, incorporating effective communication support through the use MyChoicePad and Makaton. Mencap intend to buy MyChoicePad from Zoe and incorporate it as an element of each of their different programmes.

**UnLtd/WAYRA (wayra.unltd.org.uk)**

An innovative example of one large charity and one major commercial company collaborating to support the growth of tech start-ups tackling social issues. UnLdt, the world’s largest supporter of social entrepreneurs, and Wayra, Telefonica’s global tech start-up accelerator programme are collaborating on the programme which is 50% funded by the UK Government. It offers the potential for tech-start-ups to scale up and reach national and international markets through Telefonica’s existing operations.
2. Role: Social Innovation Broker

Our interviews and workshop suggested that brokers may play a key role in supporting collaborations for scale. Innovation brokers have the interest, networks and expertise needed to identify and support effective connection and collaborations between different types of social sector organisations. Brokerage roles can range from general horizon scanning for new ideas to share, through to stress testing innovations and brokering commercial partnerships. They depend on credibility, trust and an understanding of how very different organisations can best work together. Brokering successful collaborations involves more than just identifying organisations with a common agenda, it requires an appreciation of the motivations, priorities, culture and working styles of potential partners so the best fit between organisations can be achieved.

“We have been trying to work with very small ventures for a while but it’s very hard. Big and small organisations are coming from two different places so it’s hard to work together.”

Large social sector organisation, 2013

“For smaller organisations to be of interest to us, they would need to band together to form a consortium and offer wider benefits.”

Large social sector organisation, 2013

Examples of Social Innovation Brokers

**HACT, (www.hact.org.uk/housing-innovations)**

Described as a “55 year old start-up” the housing charity has transformed itself to become an innovation broker to the housing sector. Having secured investment from leading housing associations who also sit on the board, the charity identifies, develops and then sells innovations that can help housing organisations improve their impact – these include Community Insight, a GIS based mapping tool, and Population Insight, a free database providing data about communities in specific neighbourhoods.

**STIR (www.stireducation.org)**

A small Indian-focused charity that has been housed, supported and funded by much larger education charity ARK. Founder Sharath Jeevan had established a strong relationship with ARK via his involvement in founding Teaching Leaders with them previously. STIR seeks to improve the standards of education across India by enabling teachers to identify, stress test and share a wide range of education interventions that really work. STIR works with schools to identify innovative approaches to teaching, classroom management and then works with scale-partners to disseminate them to other schools. Its main “scale-partners” are foundations that run networks of schools across India and can promote good practice across their internal teaching networks. It aims to identify 500 “micro-innovations” in the classroom and reach over a million children over four years.
3. Role: The ‘Institutional’ Entrepreneur

Many of the current approaches to scaling social innovations are borrowed from venture capital and market-facing financial approaches. Whilst it is clear that the market model is relevant in many cases, for many social ventures the need to change the external political, economic, legal and cultural context also play a key role in enabling social innovations to take hold and disrupt the established order. Anecdotally, scaling social innovation is a much messier business than the talk of pipelines and investment processes would suggest.

A feature of social innovation is its role in social and public service delivery. This often involves complex, indirect relationships between end-users, purchasers and providers of services. For emerging social ventures, successfully scaling through breaking into these markets can be complex. Large social sector organisations, with their knowledge of public sector commissioning processes, networks, and advocacy functions, have the potential to play a key role in supporting social innovations to succeed in these difficult conditions. As an example, the work of RNID in making the case to Government for providing digital hearing aids through the NHS, shows the role that social sector campaigning can play in improving access to life changing new technology.

“We are always talking to policy makers about how to improve public services and identifying better, more efficient ways to meet social need, so we are really well placed to make the case for the adoption of new social innovations.”

Large social sector organisation, 2013

Arguably, this calls for some larger social sector organisations to radically rethink their roles and models of working. Carving out a role as an ‘institutional entrepreneur’, rather than seeking to redirect their own activities towards innovation generation may prove a better use of their existing skills and assets for some organisations.

“Equally important to social innovations are the institutional entrepreneurs: those individuals or networks of individuals who actively seek to change the broader social system through changing the political, economic, legal, or cultural institutions, in order that the social innovation can flourish”

Dorado, 2005
Examples of Institutional Entrepreneurs

The Future Leaders Trust (www.future-leaders.org.uk)

Founded in March 2006 Future Leaders Trust has been initiated, supported and grown by the children’s charity ARK who has a family of educational charities including Teach First and Teaching Leaders. Future Leaders is about attracting and managing talent in the education system. Its innovation is a focus on providing potential future head teachers with the very practical skills and on-going support they will require in order to become head teachers of challenging schools.

ARK’s role in incubating Future Leaders has been profound and highly strategic. It’s Chair, Sally Morgan is also Chair of Ofsted, and its advisors include a number of head teachers, and Brett Winghorst from Teach First. This makes the organisation well connected within education policy circles and enabled it to make the case for a greater focus on leadership development in teaching. The charity sits alongside Teach First and Teaching Leaders in providing a talent pool from graduate entry to education through to top leadership. Future Leaders cohort has grown from 22 in 2006 to 77 in 2012. Over 60% of its cohort has gone on to take up head teacher positions.

RSA (www.thersa.org)

The RSA is a think-do tank with 27,000-strong Fellowship. The RSA regularly commissions research on key social issues that help to shape public policy and attract pilot funding. One example is the RSA’s Commission on Illegal Drugs, Communities and Public Policy. Recommendations from this report led to the development of a Whole Person Recovery pilot in West Sussex. This has led to a local partner CRI approaching the RSA to deliver a contract in Kent using the model. The partnership will test the model at scale and also the potential for being commissioned more widely. Although RSA may have the option for further partnerships or consultancy the key is that the model is researched and tested and has the potential to influence policy and be adopted by commissioners and practitioners.
4. Role: The Collective Impact Network

Conventional investment approaches to social innovation have focused on funding one individual, organisation or entrepreneur, often through a competition type format. This carries over from approaches amongst venture capitalists, particularly in silicon-valley. The research literature and practical experience, show that social change is complex, and unlikely to be achieved through growing lone agents or interventions. The potential for large social sector organisations to work with Government, foundations or intermediaries to create collective impact network around specific social problems has emerged from our research as an interesting area for further investigation.

“Occasionally, individuals have the skills of both the social and institutional entrepreneurs, but generally it is wiser to think of actor nets or groups behind successful social innovation.”

Westley and Antadze, 2007

There is a growing interest in systems thinking in the social innovation world as a more effective and sophisticated way of tackling “wicked” problems. Understanding social problems at a systems level has the potential to develop more effective responses but may also question the current approach to investing in individual organisations or holding innovation competitions where there are just a handful of winners.

Collaborations between groups of large social sector organisations and groups of innovators to create ‘collective impact networks’ that tackle complex social problems from multiple angles, alongside driving up demand for these interventions from commissioners, are worthy of greater interest and support. The examples below show how some funders and organisations are using collaborative impact network approaches to improve social impact and reduce unhealthy competition between social sector organisations. While this is very encouraging, questions such as how social innovators and large charities collaborate equitably within these networks, how learning is shared, how Intellectual Property ‘works’, and what happens next are still to be answered.
Examples of Collective Impact Networks

Big Lottery Fund (www.biglotteryfund.org.uk)

‘Realising Ambition’ is a £25m programme funded by The Big Lottery Fund. Ex-offender charity Catch22 have won the contract to be the key strategic partner managing the fund which supports a portfolio of charities – “peer” organisations, tackling the same issue from different perspectives. The focus is on evidence based approaches and interventions designed to help children and young people aged 8-14 to avoid pathways into offending, giving them a better chance to realise their ambitions and their potential.

RNIB (www.rnib.org.uk)

RNIB and their partners are unusual amongst large charities in that they operate a Group structure, more commonly seen in private sector companies and housing associations. They have merged with, or acquired, multiple sight loss organisations, including Action for Blind People, National Talking News and Magazines Braille and the Cardiff Institute for the Blind amongst others. The catalyst for this was RNIB’s development of the ‘UK Vision Strategy’ which describes a set of common goals around sight loss prevention and support for people living with sight loss, which is recognised by Government, professional health bodies, and charities. This collective vision provided an impetus for greater collaboration between organisations and in part led to the creation of the RNIB Group. Mergers and acquisitions were used to align different organisations under a common strategy and enabled the RNIB group to streamline and widen access to services and support for visually impaired people across the UK, while reducing duplication and unhealthy competition for resources between organisations with similar missions.
**Recommendations:**

“It’s not the solution itself which is necessarily radical, but the shift in perspective with which we begin”\(^{34}\)

_McDonough and Braungart_

**Social Innovators** should consider:

1. Identifying the dominant organisations who may exist in their “markets” and clarifying their strategy in relation to them - ignore, destroy or collaborate – if a venture is successful established organisations will be asking the same questions.

2. Identify preferred roles for potential collaborators and assess which organisations are best placed to play them.

3. Test potential scale partners for compatibility – assess characteristics of larger organisations for skills and track-records in partnering, supporting smaller organisations, internal innovation and attitude to risk.

4. Challenge support organisations and investors for assistance in identifying and brokering scale partners.

**Larger social sector organisations** should consider playing one or more of the following roles:

1. Scale Partner: leverage their brand, delivery infrastructure, networks, customer base, reputation, financial resources and business acumen in a wide variety of different ways to help scale ventures that have a social impact.

2. Social Innovation Brokers: actively seek out new innovations, build trusted relationships with innovators and potential scale partners, and help make good ideas available to other organisations, policy makers and funders in a specific field.

3. Institutional Entrepreneurs: create the environment in which promising social innovations can flourish e.g. through advocating for legislative policy or practice change, promoting new innovations to commissioners, and supporting cultural acceptance of new ways of meeting social needs with end-users and the public.

4. Collective Impact Convenors: actively promote, convene and participate in collective impact networks as ways to help promote impactful collaboration between multiple organisations on specific social issues.
**Funders, intermediaries and policy makers** should consider doing the following:

1. Develop new funding streams and accelerator programmes that encourage partnerships between established social sector organisations to support later stage, as well as emerging, social innovations. The UnLtd and Wayra programme\(^5\) provides an interesting model.

2. Develop new ways of engaging large social sector organisations in the social innovation pipelines, including sponsoring, supporting, designing, investing in and scaling social innovations. For example:

   Develop a new fund where social sector organisations commit funding to develop and scale social innovation on a thematic issue, which is matched by Government and business. The Social Innovation Fund\(^6\) from the US provides an interesting model.

   Revise accelerator and incubator programmes and innovation competitions to engage with potential scale partners from the outset. (See Practical Tools section for a possible model). For example, rather than cash prizes, secure support from external organisations to help winners scale their venture.

3. Develop more focused, thematic funding and support programmes that encourage the development of ‘collective impact networks’ around specific social challenges, e.g. Big Lottery’s Realising Ambition programme.

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54. McDonough and Braungart, (2002) *Cradle to Cradle, remaking the way we make things*

55. [http://wayra.unltd.org.uk](http://wayra.unltd.org.uk)

56. North, 2012, *Impetus Trust - From social innovation to social investment – learning from the US*
Three practical approaches for better collaboration

Below we outline some practical ideas that could help large social sector organisations and social innovators collaborate more effectively.

**A: Choose a role/s**

Roles required to scale social innovation: identifying the rights role/s for your organisation

The roles of “bees and trees” can be separated into some of the roles below. Organisations that are interested in getting more involved in social innovation can use the list below to identify the role that best plays to their strengths and structures. Organisations can and often do wear more than one ‘hat’ but should avoid trying to play all the roles.
Role: Bees....

1. **Innovators** - those who are developing new, more effective responses and solutions to endemic social challenges, usually individuals, small organisations, or departments.

2. **Intrapreneurs** - individuals inside large organisations that can promote an internal culture of innovation, build external networks with innovators, and develop and steer collaborative partnerships through the complexities of large organisations.

Role: Intermediaries and support organisations....

3. **Incubators** - support social ventures to develop, refine, test, evaluate, promote and establish their venture and identify the right route to scale.

4. **Social Innovation Brokers** – connect organisations together at the right time in the right way to develop effective collaborations, and advise innovators and scale partners on the best partners and collaboration points.

5. **Incentivisers** - those who can create the frameworks and incentives that make collaboration between large and small organisations more desirable and possible. Enabling organisations to learn from failure is a key part of this role.

Role: Trees....

6. **Scale partners** - larger, established organisations who can leverage their brand, delivery infrastructure, networks, customer base, reputation, financial resources and business acumen in a variety of different ways to help scale social ventures.

7. **Institutional entrepreneurs** - work to create the environment in which promising social innovations can flourish, e.g. through advocating for legislative policy or practice change, promoting new innovations to commissioners, and supporting cultural acceptance of new ways of meeting social needs with end-users and the public.

8. **Funders and investors** - those who can fund, or support in kind, the above roles, including collaborations, innovation, scaling and growth of activities with a variety of risk profiles.

9. **Collective impact network convenors** - those who can facilitate collaborations between multiple organisations or projects for the achievement of specific social goals.
B: Find the right partner

Types of Bees and Trees: identifying the right collaborators for your organisation

There are different types of bees and different types of trees. Finding compatibility is key. Following interviews and our workshop, we’ve drawn upon the work of social service design to develop some “personas” that illustrate different perspectives and priorities for organisations and individuals who have a role to play in scaling social innovation.

These are composites from our research that reflect different organisational attitudes to risk and the degree to which individual innovators or organisations require ownership or ongoing control over new products or ventures. It provides some insight into what types of partners each persona would prefer to work with, and may prove useful in helping different actors understand the best role for them to play in the innovation eco-system and identify the right partners.
“Open Sharer”
• Serial/idea-tors - individuals energised by involvement in developing new ideas
• Ownership/involvement with development not a priority
• Usually have a day-job already
• Work across various sectors/organisations
• Found at hack-days, open source platforms, social tech, hubs
• Culture – pro-creative commons, open source

“Owner/manager”
• Entrepreneurs/serial entrepreneurs
• Ownership and development a priority, strong association with the innovation and a commitment to quality and the core vision
• Often ex-staff member/beneficiary with experience and key insight into social issue
• Open to investment, partnership, commercial deals with larger partners in order to get the products/services to scale and reach the right audience
• Found at sector events, networking, social accelerator programmes

“Collaborator”
• Ambidextrous collaborator – can act as innovator, entrepreneur outside an organisation or manager, intrapreneur inside one
• Pragmatic – wants best way of development of new solutions to reach maximum potential, flexible on how that happens and their longer-term role, may have other ideas they want to move on to
• Biggest concern is that larger partner may waste or squash opportunity of an innovation
• Found often responding to innovation challenges and competitions
Large Social Sector Organisations Types - ‘Trees’

“Cautious Gate-Keeper”
- Focused on business development and quality
- Concern is that “new solutions are proven to work”
- Comfortable with using in-house staff teams to make incremental improvements to services
- Gets involved when ideas are tried and tested and can be easily adopted.
- Often looks for “permission” from funders, regulators, recommendations from other organisations to engage in more radical projects
- Needs control and influence over new initiatives – ownership preferred or tight contracts

“Pilot and Prove”
- Keen to try out new ideas, partnerships and initiative
- Needs a structured approach, agreed process through Board and clear guidance.
- Open to partnerships and willing to invest and work with partners with similar culture
- More substantial innovations – prefers developing in-house
- Emphasis – quality and impact and financial sustainability

“Bold Entrepreneur”
- Likes to be first in class, leader of the pack, influencing peers and policy
- Open to collective approaches to social problems and new types of partnership with funders/investors, challenges and competitions
- Sometimes appear “messy”, leads can come from dynamic CEO, Board, intrapreneurs working throughout the organisation
- Less concerned about “IP” and wider adoption of ideas, as with getting strong boosts for the brand and the social message, being seen to take a lead most important
**Table: Finding the right collaborator**

<table>
<thead>
<tr>
<th><strong>Social Innovators Personas</strong></th>
<th><strong>Open-Share</strong></th>
<th><strong>Owner-Manager</strong></th>
<th><strong>Collaborator</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold Entrepreneur</strong></td>
<td>Promising</td>
<td>Promising</td>
<td>Promising</td>
</tr>
<tr>
<td></td>
<td>For “open innovation”</td>
<td>Joint-venture, piloting, accessing markets</td>
<td>Joint-venture, buy-outs, piloting, accessing markets, part of impact-networks</td>
</tr>
<tr>
<td><strong>Pilot and Prove</strong></td>
<td>Possible</td>
<td>Promising</td>
<td>Promising</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pilot growth/new location once tested</td>
<td>Possible joint-venture, franchise, buy-out once proven</td>
</tr>
<tr>
<td><strong>Cautious Gate Keeper</strong></td>
<td>Unlikely</td>
<td>Possible</td>
<td>Possible</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Once at scale and proven</td>
<td>Once at scale and proven</td>
</tr>
</tbody>
</table>

The table above speculates as to how different potential collaborations will work.

Examples above:

“Cautious Gate Keeper” may only be interested in our social innovation types, once they’ve reached a scale, have been proven and probably partnered with others in their sector.

“Bold Entrepreneurs” may find opportunities to work with all three types of social innovator – through open innovation programmes, competitions, incubation, investment, joint-ventures and so on.

Social innovators who act as “owner-managers” will require their ongoing involvement to be central to any partnership for scaling up.

A “pilot and prove” organization may be interested in establishing intellectual property rights and ownership, which may clash with the open-collaboration culture of an “Open Sharer”

Readers are welcome to make their own assessments.
C: Get involved earlier

“We would ensure that the relevant country Government was aware of it (and involved) so if it was successful the Government might roll it out nationally.”

UNICEF on helping promising social ventures find scale partners.

How incubators and accelerators can design for scale

There are a growing number of social (venture) accelerator programmes – these provide intensive support for early stage ventures with a social/environmental purpose. The “classic” model for commercial or social accelerators is to prepare towards pitching for investment and further growth. We believe that there is an opportunity for larger social sector organisations to be involved at various stages throughout the accelerator programme but most specifically as partners providing routes to scale for promising innovations. Clearly this won’t be suitable in all cases, however we feel it is currently missed as an important option.

Conventional Social Accelerator/Incubator

Alternative Approach

Potential Involvement of Large Social Organisations
Large charities and housing associations (and other large social sector organisations) have been overlooked as key partners in the innovation ecosystem.

They are well placed to play the role of “trees” providing a thriving environment for the cross-pollination of ideas and opportunities for scaling emerging innovations from the “bees”.

These organisations have real potential to help social innovations achieve greater scale and real impact, and they can act as effective scale partner in a surprisingly diverse range of ways. However, for this potential to be realised large social sector organisations need to play to their strengths and all actors in the innovation eco-system need to rethink their roles and relationships with each other. To achieve this three things need to happen:

1. Culturally the social sector needs to recognise that individual ‘silver bullet’ social innovations are rare, and support more, coordinated ‘network’ innovation that tackles social problems from multiple angles and using multiple levers simultaneously.

2. Large charities and housing associations need to look outside for new innovations and ideas, recognise they can add more value to social innovation as scale partners, brokers and institutional entrepreneurs, and reconfigure themselves to play these roles.

3. Funders, policy makers and intermediary organisations that exist to promote and scale social innovation need to recognise the potential of larger social sector organisations to scale social innovation and find ways to incentivise and support these organisations to play these new roles.
## Appendix 1

**Interviewees, Workshop Participants and Contributors:**

1. ARK, Lucy Heller
2. Aster Housing, Paul Smith
3. Big Lottery Fund, Chris Butcher
4. Bethnal Green Ventures, Paul Miller
5. Catch 22, Tom Traynier-Lewis
6. CAN Breakthrough/Young Foundation: Richard Kennedy
7. Comic Relief, Billy Dann
8. Design Council, Mat Hunter
9. Family and Parenting Trust, Anand Shukla
10. Future Leaders, Mark Smith
11. Good Gym, Ivo Gormley
12. Guys and St Thomas’s Charity, James Murray
13. HACT, Matt Leach
14. Insane Logic, Zoe Pedden
15. Impetus Trust, Jenny North
16. Macmillan Cancer Support, Juliette Bouverie
17. Macmillan Cancer Support, Dr Marianne Gulbrandsen
18. Mencap, Alison Pike
19. MindApples, Andy Gibson
20. NSPCC, Joanne Hay
21. NSPCC, Sonja Jutte
22. Nominet Trust, Dan Sutch
23. 100% Open, Lucy Gower
24. 100% Open, Roland Harwood
25. OXFAM, Nicolas Colloff
26. OXFAM, Matt Lumsden
27. Orbit, Boris Worrall
28. Orbit, Christoph Sinn
29. Point People, Cassie Robinson
30. Riverside, Hugh Owen
31. Riverside, Paul Booth
32. Spectrum, Jitinder Takhar
33. RNIB, Lesley-Ann Alexander
34. RSA, Matthew Taylor
35. RSA, Adam Lent
36. Social Investment Business, Jonathan Jenkins
37. Social Business Trust, Adele Blakeborough
38. Shaftesbury Partnership, Patrick Shine
39. Shared Assets, Mark Walton
40. STIR, Sharath Jeevan
41. Spots of Time, Anna Mouser
42. UNICEF, Erica Kochi
43. UNICEF, Katherine Crisp
44. UnLtd, Dan Lehner
45. UnLtd, Cliff Prior
46. VSO, Mark Rowland
47. SAID Business School, Dr Marc Ventresca, University Lecturer in Strategic Management,
Appendix 2

Summary of idea generation from research workshop held on 10 July 2013

“BIG OUTCOME INCUBATOR FUND CHALLENGE”

What problem is your idea solving?
Removes unhealthy competition and enables multiple interventions on one issue

Idea in a nutshell?
Funding to create collective impact networks around a specific thematic issue – payment by results option convened by 1 lead organisation, multiple partners

Why is it productive?
Incentivises collaboration – around a shared goal, and makes role greater than sum of its parts.

Why is it practical?
Incentivises a process that already exists but is hard to achieve

Idea summary:
- 5x funds (DH, DfE, DEC, DWP, CLG) focus on 1 outcome
- They put in 50% of the operational costs and investment costs
- Big organisations in each sector tender to manage fund and seek match funding (could be their own)
- Once selected they incubate, accelerate and invest x 10 starts ups
- Big organisations aggregates collective outcomes
- Government pays more if outcomes are higher than expected/agrees
- Extra funds are shared with external investors +/- reinvested in start-ups

OPEN INNOVATION CHAMPIONSHIP

What problem is your idea solving?
Inertia and reticence of large organisations to open up their border to open innovation.

Idea in a nutshell?
3 large charities win a competition run by government – to run open innovation competition to find and grow the best ideas to thorny social problems… e.g. mental health, unemployment, economic decline

Why is it productive?
It uses existing organisations, expertise, knowledge to attract new ideas and money to tackle thorny problems more effectively. Government uses its role as champion and focal point to turn a weakness (lack of government funds, competition amongst charities, egos of CEOs) into a strength…

Idea summary:
- Government helps identify 3 key issues
- Government then runs a competition amongst large charities to be champion of an open innovation process to find new ideas to tackle problems… only those with best understanding of the issue, and best proposals for networks, commit to piloting and growing winners and how ideas can be scaled openly in the sector will win…
- Charities put in 1% values of their own turnover
- Match funding is provided by funders (big lottery? Corporates? Social investors? Nesta?)
- Government puts in nothing upfront but provides venues for meeting, direct support from ministers, support and influence to get people together
- Charities appoint innovation team/company to convene open innovation rounds – could be a competition (like Innocentive) could be a collaborative community – could be a combination of the two
- Large charities get – profile, access to ministers, brand support

SOCIAL INNOVATION PIPELINE FUND
What problem is your idea solving?
Lack of capacity and evidence and scale in the sector

Idea in a nutshell?
Government grantmaking = £2bn pa – this should be given via expert intermediaries (who will in turn match fund) and are charged with scaling great ventures/ideas

Why is it productive?
Because it brings new money and skills into social innovation

Why is it practical?
Because money is arguably not very well spent at the moment, and the expertise is out there in large organisations/established intermediaries

Why is it pioneering?
Because it involves government letting go of money and it’s not top down or ideological

BUILDING A SUSTAINABLE DIGITAL FUTURE
What problem is your idea solving?
Funders are not recognising digital social enterprise – it’s about incentivizing collaboration between charities and social enterprise in this space

Why is it productive?
Encourages scalable social business and modernises charities in solving social issues

Why is it practical?
Common sense – products and organisations are already out there – just brings them together

Why is it pioneering?
The driver is technology and so it is scalable

Funders: to actively encourage programmes that encourage large charities to work with scalable social enterprises on scalable projects.
LITTLE SHOP OF POSSIBILITIES

What problem is your idea solving?
Lack of visibility of social innovations, hard to link innovators with potential scale partners

Idea in a nutshell?
A central public showcase for social innovations, building on the NT100.org.uk for social tech where scale partners can see what’s out there and connect with innovators. Post-up or share up and coming innovations and feeds relevant ideas to organisations in a position to scale.

Why is it productive?
It’s simple, uses existing technology and makes life easier for large organisations

Why is it practical?
A version of it already exists could be expanded to include non-tech innovations

Why is it pioneering?
It’s a simple response to the need to connect social innovators with those organisations that can help them scale.

INTRAPRENEUR LINK

What problem is your idea solving?
Difficult to connect those interested in innovation and who are based in large organisations (intrapreneurs)

Idea in a nutshell?
Create experimental network to see if there’s demand (intrapreneurs who want to connect)

Why is it productive?
• Share knowledge and good practice and provide mutual support – low set-up costs, easy to set up online or in-person (“meet-up for intrapreneurs”)
• The link will enable intrapreneurs to feel less isolated, share ideas on being productive, and potentially attract credibility and some support within established organisations

Why is it practical?
Low-cost trial – “beta” means of seeing if there’s demand – start with simple email group…

Why is it pioneering?
Doesn’t exist and supports innovators within large non-innovative organisations
INTRAPRENEURS VS INERTIA
What problem is your idea solving?
Cultural inertia and risk aversion and difficulties in implementing good ideas and providing external links to others

Idea in a nutshell?
Empowering intrapreneurs to see their ideas through and support other people to do the same

Why is it productive?
Moving the pub conversation (that are already happening) into the office and actually making ideas happen

Why is it practical?
Harnessing existing energy and knowledge – making it achievable with senior buy-in

Why is it pioneering?
• Linking the “usual suspects” from the outside world with intrapreneurs
• Making intrapreneurship accepted and effective

HONEST SOCIAL IMPACT NETWORK
A forum for honest discussions about social impact, innovation, risk and failure

Idea in a nutshell?
• Create space and conditions for risk and failure to be openly discussed as a means of learning and improving the path to social impact
• Provide training on risk and managing failure

Why is it practical?
• Low start-up costs can be trialled and tested online or via a meet-up
• Knowledge generated helps improve success rates of social enterprises/innovations

Why is it pioneering?
• Brings to light essential topics that are important but often not discussed
• Improves performance through shared learning

WELL NET – “THE ETSY FOR WELL BEING”
What problem is your idea solving?
Inaccessible routes to commissioning

Idea in a nutshell?
• Local well being consortia to host, prove and market small scale services to GPS
• A clearing house for local incubators/market place for health and well being services

Why is it productive?
• Services already exist, commissioners already exist – simply brings them together

Why is it pioneering?
• Services do not currently exist – brings opportunities for great local services to win commissions and contracts – and to help the public more widely access to great services
Appendix 3

Clayton Christensen on disruptive innovation

Clayton M. Christensen is the Kim B. Clark Professor of Business Administration at the Harvard Business School

Clayton Christensen argues that innovation can be broken down into three different types: disruptive, sustained and efficiency. When disruptive innovations emerge in an industry, usually they are ignored by established organisations as being initially low cost, lower quality, small scale and don’t fit to accepted performance standards. Over time the disruptive innovations improve in quality, are adopted by different customer segments until they come to dominate a market and oust the established company. For managers in the dominant businesses, this is the equivalent of the frog in the slowly boiling water he argues. Christensen shows that despite good managerial decisions, failure to spot a disruptive innovation can spell the demise of a company’s market share.

We’ve adapted these categories and their potential impacts on society for the purposes of this paper. It’s not always immediately apparent the implications of an innovation and easier to judge in hindsight.

Table: Interpreting types of innovation in the social sector:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Examples might include</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disruptive*</td>
<td>Transforms relationships, behaviour, way of thinking, organisational types, policy, significant difference to social outcomes</td>
<td>Business: introduction of the personal computer, mobile phone, introduction of supermarkets, online shopping Social: Personal Budgets, founding of the NHS, compulsory education</td>
</tr>
<tr>
<td>Sustained</td>
<td>Incremental – strong improvements to existing ways of working, strengthening relationships, organisations within existing models</td>
<td>Business: subsequent generations of PCs, Social: Teach First, introducing new tech eg sales-force</td>
</tr>
<tr>
<td>Efficiency</td>
<td>Reductions in costs and operations, able to do the same for less – within existing models of working</td>
<td>Business: discount retail (Walmart) Social: DWP/government contracts, payment by results, Social Impact Bonds</td>
</tr>
</tbody>
</table>

*assumption within this paper is that levels of disruption correlate to achievement of scale (whether influence on policy, behaviour-change, products, services and so forth)
Appendix 4

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