

Social R&D National Gathering Summary

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Acknowledgements

This report was informed by survey results, participant quotes and feedback from hundreds of practitioners who attended the national gathering. We are incredibly grateful to all attendees for their engaged participation and commitment to strengthening and growing the field of social R&D in Canada.



Social Innovation Canada (SI Canada) is an emerging pan-Canadian initiative to connect social innovation practitioners, build the capacity of our sector, and elevate this work in Canada and beyond.

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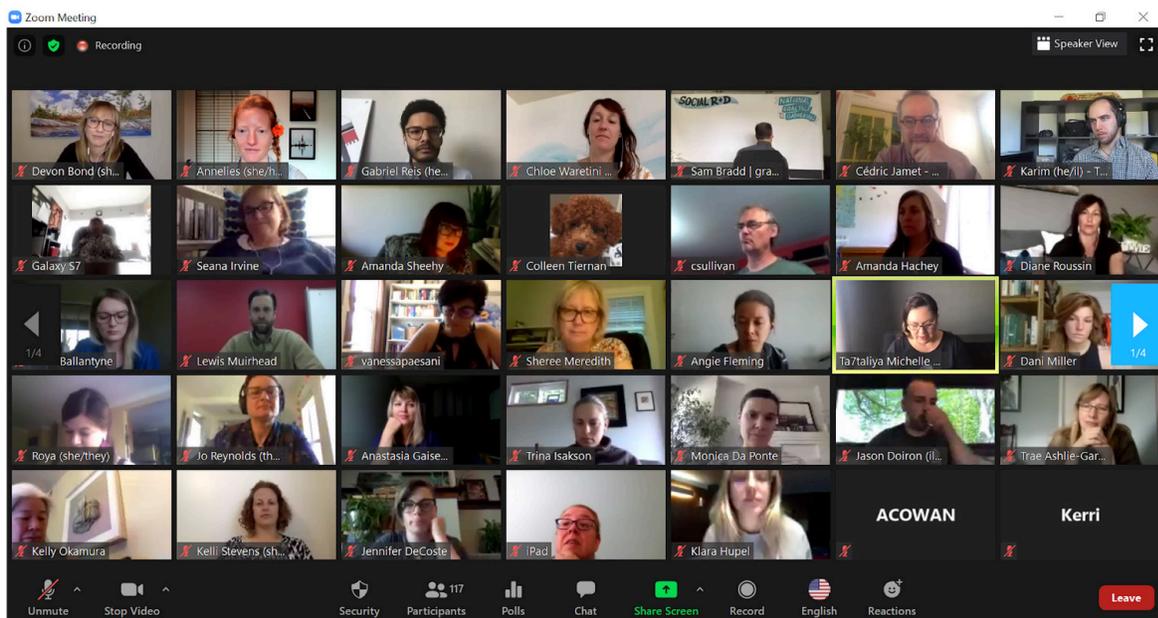
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“I really enjoyed the land acknowledgement and the reminder to introduce yourself with the native lands you’re currently on as well as your ancestry. Before your job title and professional blurb”

Framing & Context

On June 16th and 17th 2020, Social Innovation Canada hosted a virtual National Social R&D Practice Gathering. The event was designed to achieve the following objectives:

1. Connect as a community of Social R&D practitioners to learn from and with each other
2. Explore how we as a field are adapting our practices to respond to this changing time
3. Discover and apply new methodologies to our social impact work and opportunities for investment readiness support
4. Continue to build a national narrative around the social R&D field.



Due to the COVID pandemic we did our own Social R&D to pivot and develop a unique and comprehensive online convening for two half days through Zoom. We built out a strong team with experience in providing engaging facilitation and digital convening. We also incorporated an emergent design into the event that enabled open discussions for attendees to connect on the topics that were most pressing to them at the time of the convening. This was especially important given the rapidly evolving nature of our world.

Social R&D Community

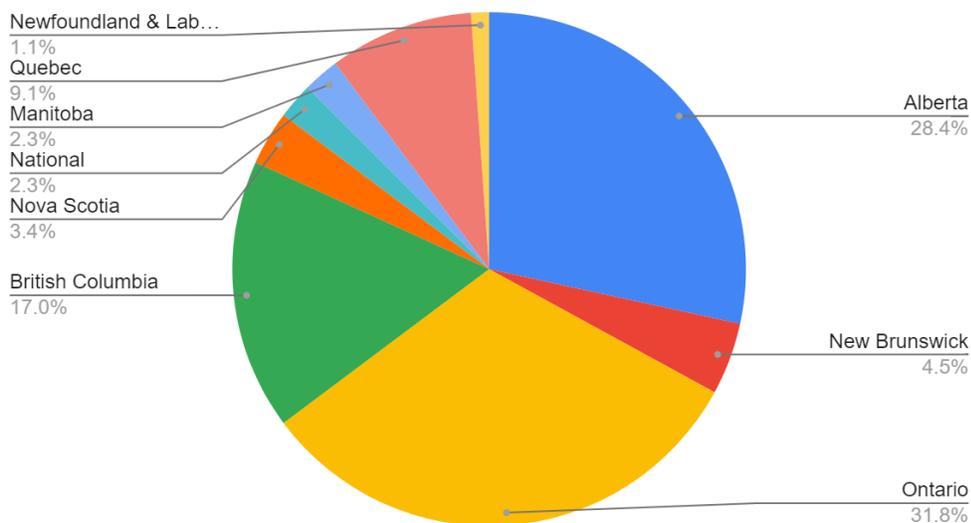
The Social R&D Community is a network of practitioners dedicated to growing the craft of research and development in the social sector. Social R&D practitioners use creative approaches to generate new knowledge and innovations (services, programs, initiatives or products) to address complex social, environmental and cultural challenges.

The Social R&D Community of Practice has been in existence since 2015 and the field of social R&D has been growing and evolving as a result of the concerted effort of this community. In addition, a National Social Labs gathering (Converge) was held in June 2018 which further advanced collaboration and progress in the social R&D field.

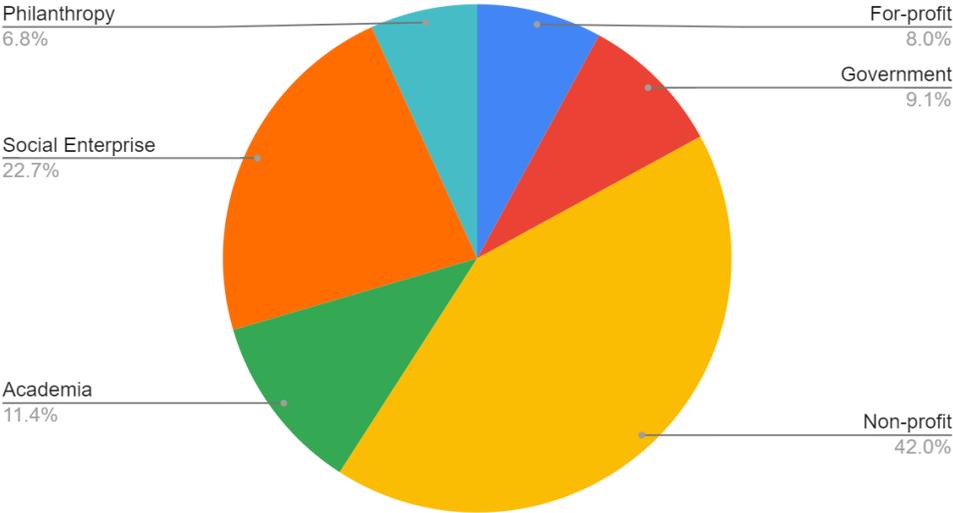
The June 2020 National Practice Gathering brought together 200 participants from across Canada with geographic and sector concentrations as shown from the pre-conference survey results (88 responses) below. There was a concerted effort made to increase the diversity of attendees and to leverage the increased accessibility due to the lack of need to travel, and the sliding scale cost for the event.

“Cross canada representation and multi sector representation ensured broad perspectives and experiences.”

In which province/territory do you primarily work?

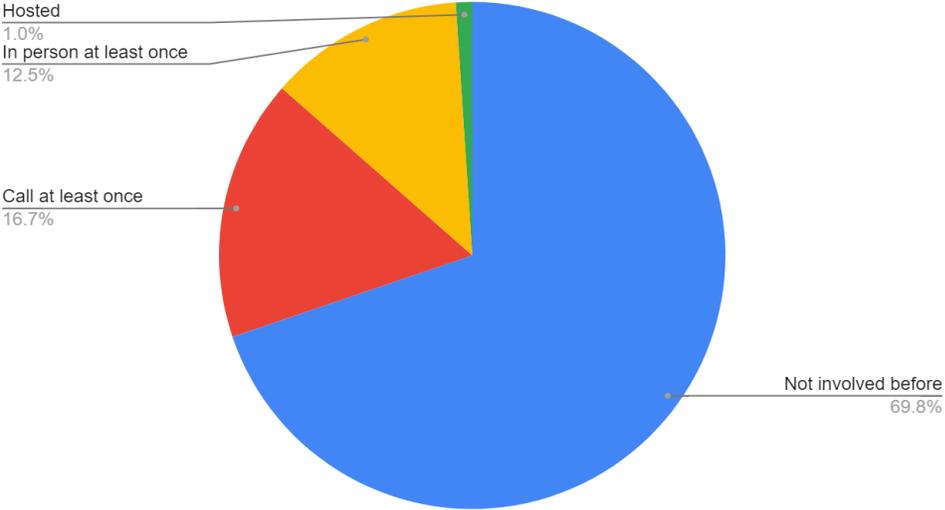


In which sector do you primarily work?



Participants who attended also brought new perspectives to the discussion given the relatively high participation rate of individuals who had not previously been part of the social R&D Community of Practice or who had varied familiarity with social R&D practices.

Have you been involved in the Social R&D Community?



■ Highlights

The content was designed to support practitioners from various levels of experience and diverse sectors of practice. We focused on elements that were best accomplished together, online in an engaged format rather than content that could be watched later as a webinar.

We featured the stories of practitioners from across Canada, supported deep discussions on tools and tactics leveraged to address the sustainable development goals, enabled open dialogue on tough topics such as racism, exclusionary language, and funding access, and set up peer input groups to enable practitioners to support one another through challenging situations.



Some digital techniques we employed included engaging breakout sessions, music, movement and breathing exercises and breaks, as well as principles, practices and a very transparent opt-in/out schedule that supported individuals to participate in as much or as little as they were able. While many of course wished we had been able to convene in-person, we were heartened to learn that 71.4% of respondents to a post-conference survey appreciated the accessibility of the online nature of the convening.

We are also proud of our efforts to make this event as inclusive as possible. We had a francophone co-host for the event as well as a translator providing live translation throughout. We were very conscious of featuring BIPOC voices as storytellers and hosts during the event and shifting views around the social innovation field as exclusionary and white dominated.



We had a powerful opening on Day 1 by Ta7taliya Michelle Nahanee who helped ground us in the land and our connection to one another as people first. On Day 2 we had a beautiful opening by Ravyn Wngz who led us in an exercise to connect with the wisdom of our bodies and to center us before diving in. While we still have a long way to go on celebrating diverse voices, decolonizing our practices, and decentering whiteness as an industry we are proud of the initial efforts we made.

The main design of the conference centered on 4 key blocks of content:

Stories from the field

Highlighting social R&D work by practitioners across Canada

Mapping practices

Connecting on similar focus areas to explore how we are leveraging social R&D to tackle complex challenges

Community connections

Building relationships as practitioners through open space conversations on shared topics and provocative questions in the field

Peer input processes

Providing opportunities for practitioners to work through challenges in their own work and allow for cross-community connections.

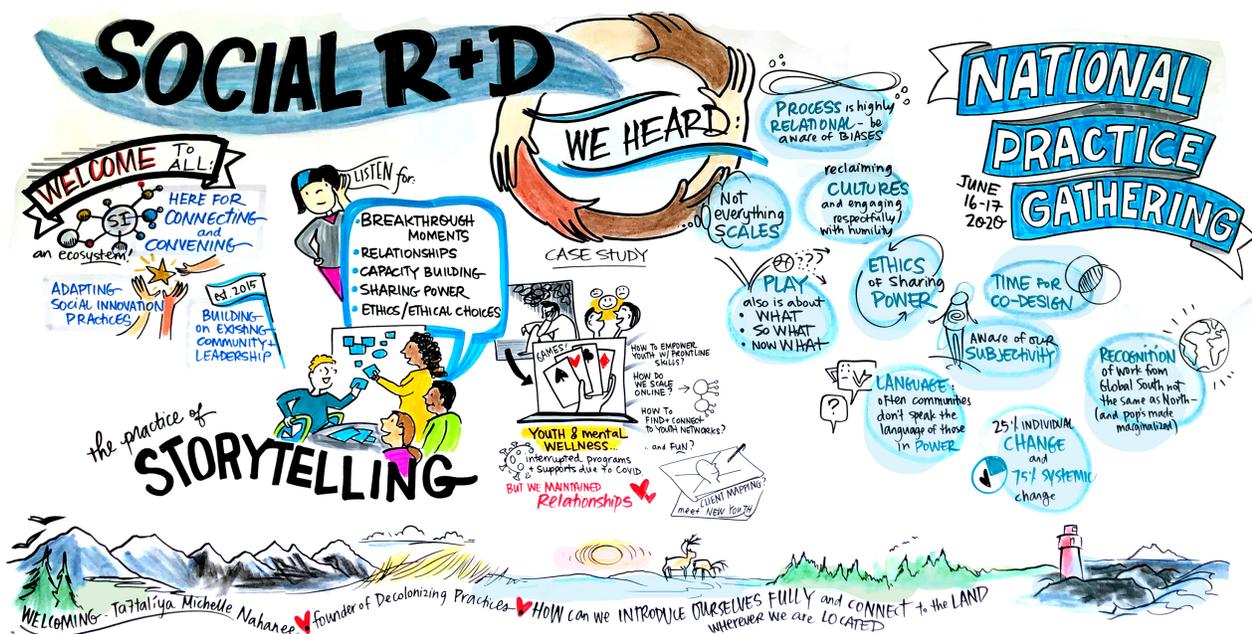
The following sections detail the top insights from these 4 segments of the convening.

“I enjoyed stories from the field and learning from the successes and challenges of how to put social innovation into practice and into the real world.”

Storytelling

Our intention

This 1st block of content featured and highlighted the stories of 15 practitioners from across Canada. The storytelling approach allowed for examples of social R&D to be demonstrated in practice, and allowed participants to connect to stories and experiences in a simple, convivial way. Attendees got an opportunity to dive deep into the work of others and discover the diversity of practices and approaches of Social R&D.



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Sam Bradd

Process

We used Zoom’s breakout room feature to create a process that allowed a (curated) selection of practitioners from the community to share their stories of leveraging R&D for social change.

In each room, participants got to practice focused listening and collective sensemaking by focusing each on a specific angle. Using this angle, they were invited to harvest insights from the story they were hearing. After the sessions, participants from each session were invited back to a collective space for a short round of dialogue around the key learnings from the stories.

Each story was recorded and the design team for the gathering is currently working on a podcast to share back this content to the broader community.

“Storytelling sessions gave time for real and intimate connections.”

Mapping Practices

Our intention

In the afternoon of the first day, participants engaged in a collaborative process aimed to foster learning relationships between people working on similar issues. Through this process we created a living catalogue of approaches, questions and practices from the social R&D community. Through the encounters and connections initiated, this block of content created a space to seed potential collaborations.

Process

Conversation groups were initiated through connecting the attendees to the Sustainable Development Goals they were working on. A series of questions helped spark conversations and supported attendees to share social R&D tools, practices and approaches that they have leveraged in their work.

A collaborative harvest process using Miro was put in place to help attendees document the insights from these conversations. The session concluded with a debrief in the broader community to identify common patterns and learnings.

Harvest

You can access [the Miro Board](#) where conversations were documented.



Open Space Discussions

Intention

The second day of the gathering was designed to open a space for courage and inquiry for social R&D practitioners. We wanted to foster a space for attendees to engage in the conversations they needed to have, given the particular and complex context unfolding before our eyes. Most notably we created space for discussions around the pandemic crisis response, the widespread social reckonings around white supremacy, gender inequality and sexual violence, and the increasing effects of the climate crisis on people's lives. Participants explored how they situated themselves and responded to the unfolding of this complex moment, and multiplied and nurtured relationships amongst one another.

Process

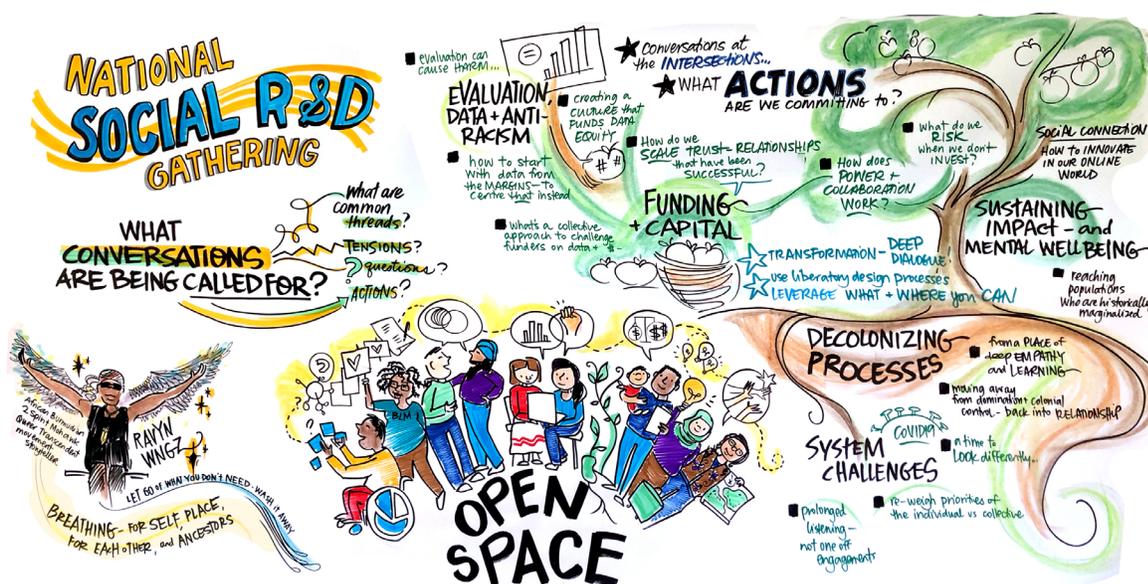
An open space process was set up around the following question:

What are the most pressing/relevant conversations you want/need to have right now?

Attendees were invited to name the conversation topics they wanted to explore with a community of peer social R&D practitioners. Participants were then able to select the topic of their choice, and engage in a breakout room, or move between them as desired. A collaborative harvest process was put in place to help attendees themselves document their conversations. The session concluded with a debrief in the broader community to identify common patterns and learnings.

Harvest:

Sam Bradd (Drawing Change) graphically harvested the outcomes of these conversations:



Peer Input Processes

Intention

The final block of the convening was intended as a space to bring forth insights from the 2 day convening to work together on practical challenges brought forward by participants, mobilizing the insights from the 2 days to achieve that purpose.

Process

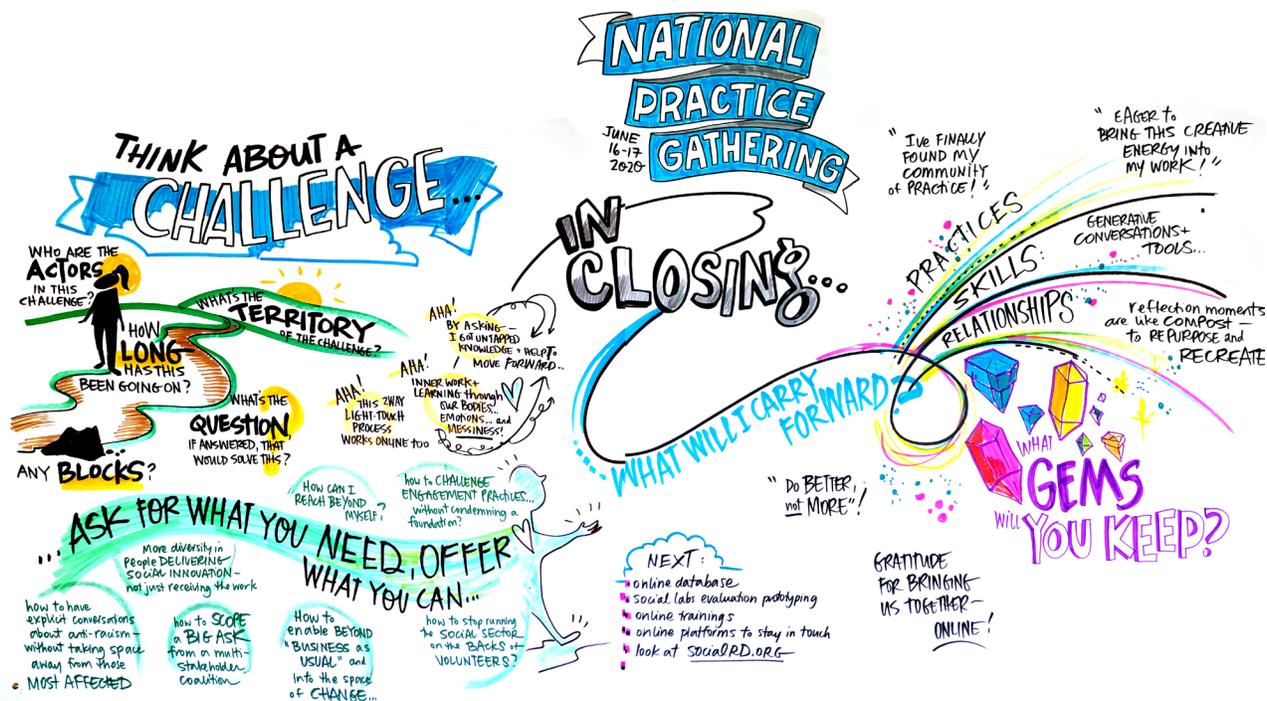
Through a guided process of personal reflection, attendees were supported to identify and describe a challenge in their work and practice involving social R&D. They then shared these challenges within a small group of peers, and brainstormed possible actions through a short, focused, guided conversation process.

A debrief in the broader community provided a space for the attendees who brought forth challenges to their group to share their insights from the process.

Harvest

Sam Bradd (Drawing Change) graphically harvested the outcomes of these conversations:

“The peer input was extremely valuable as it focused on practical ways in which to solve real challenges.”



Where do we go from here?

This convening was neither a starting point nor a conclusion - it is a continuation of years of innovation from across Canada in the social R&D ecosystem, and it will be carried forward for decades to come as the field continues to grow and evolve. What this National Practice gathering did highlight was a need to invest more deeply in the following areas:



- 1. Convenings**
- 2. Community of Practice**
- 3. Knowledge Products**

These 3 elements will form the basis of SI Canada's social R&D strategy going forward. More details on each element are captured below.

1. Convenings

After this successful convening, we have highlighted a need/desire to host another follow-up National Convening in 2021, as well as targeted events that will help us dig into key components that will help advance social R&D. The schedule for these convenings is as detailed below.

Winter 2021 Social R&D Boosterpack Gathering

Social R&D supports Social Purpose Organizations (SPOs) to develop, test, measure and scale initiatives to tackle complex social challenges. Social R&D practitioners and resources are perfectly positioned to support the work of the Investment Readiness program in advancing initiatives across Canada.

In the winter of 2021, SI Canada will be hosting a series of online “booster pack” gatherings for SPOs to help them leverage social R&D capacities and resources to advance the investment readiness of their initiatives. We will target organizations who:

- **Didn't feel ready to apply for the IRP**
- **Applied but were not selected as IRP recipients**
- **Were selected as IRP recipients but could use a boost to advance their initiatives.**

These gathering will:

- **Leverage the skills of social R&D practitioners and existing resources to equip SPOs with social R&D capabilities.**
- **Connect SPOs and social R&D practitioners to enable future collaborations**
- **Create tangible toolkits/resources that can subsequently be leveraged by other SPOs or even social R&D practitioners who are new to the field.**

Winter 2021 Policy & Funding Gathering

Previous investments in the social R&D field have uncovered barriers to greater uptake of social R&D among social service organizations. Barriers include:

- lack of tools and resources to properly undertake social R&D
- lack of funding to support comprehensive social R&D work
- lack of buy-in from senior management to incorporate social R&D practices

This gathering of social R&D practitioners, funders, and policy makers will explore the following question:

What policy or funding changes might further the uptake and efficacy of social R&D?

Spring 2021 National Practice Gathering

We built strong connections, garnered an immense amount of insights on the social R&D field, and supported one another as practitioners in the summer 2020 National Practice Gathering. Through feedback from practitioners it has become evident that hosting another gathering in 2021 will help strengthen this community and help the field continue to grow and evolve. This gathering will take a similar form to the June 2020 gathering while taking into consideration the [learnings from the past gathering](#) as well as the new context we are sure to find ourselves in by spring 2021.

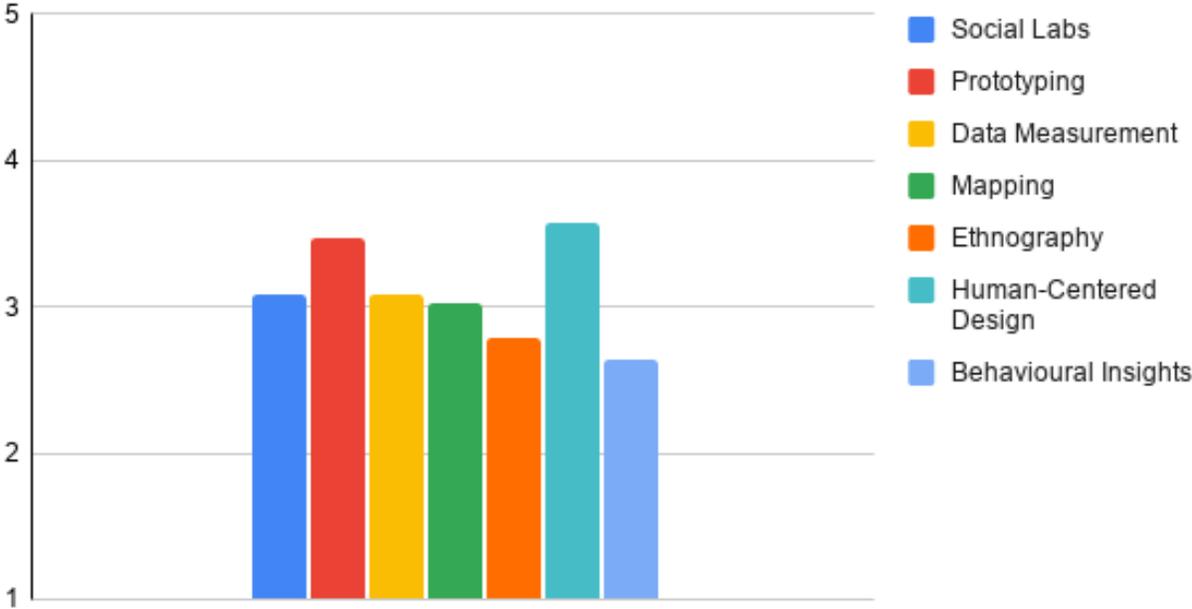


2. Community of Practice Strategy

After the National Practice Gathering, it became clear that there are a variety of individuals and organizations seeking diverse engagements around social R&D. Another investment in strengthening the field of social R&D is through the continued hosting and convening of a Community of Practice.

We've designed three Community of Practice (CoP) streams for practitioners to flow between, allowing individuals to access learning and connections that best serve their practice. We hope this CoP will help practitioners Learn from and with one another, Share and get support on their work and big challenges, and Build a strong social R&D ecosystem.

How familiar are you with the following social R&D practices?
(1: unfamiliar; 5: very familiar)



Learn Stream

Objectives

Practitioners in the Learn stream have identified that their goals are to:

- Learn new social R&D methodologies
- Learn how to apply social R&D methodologies to their existing work
- Learn from case studies put forth by other practitioners
- Learn from international experts in social R&D

Target

This stream of the CoP is being designed to serve:

- Newer social R&D practitioners
- Practitioners seeking to deepen their practice

We recognize that these practitioners have diverse needs and we will tailor specific workshops/trainings to cater to each of these 2 groups. We will communicate clearly what “level” of practice is being shared and invite practitioners to opt-in/-out based on the correct match of level or desire to learn.

Format

SI Canada will host bi-monthly learning sessions for practitioners. Some will take on a similar format of some of the storytelling sessions from the National Practice Gathering, while others will be more presentation style to support practitioners to learn and employ specific social R&D methodologies. Some will be more at the social R&D 101 level while others will provide more in-depth training to practitioners with deeper experience.

Sessions will be run by social R&D practitioners from across Canada and internationally. Honorariums will be provided to hosts as well as additional support to capture and share the insights from these sessions. Recordings from these sessions will be made available subsequently. In addition, resources will be shared on socialrd.org as well as through the Social R&D mailing list.

**“It was great to have resources shared.
The wealth of knowledge in the room was
deeply appreciated.”**

Share Stream

Objectives

Practitioners in the Share stream have identified that their goals are to:

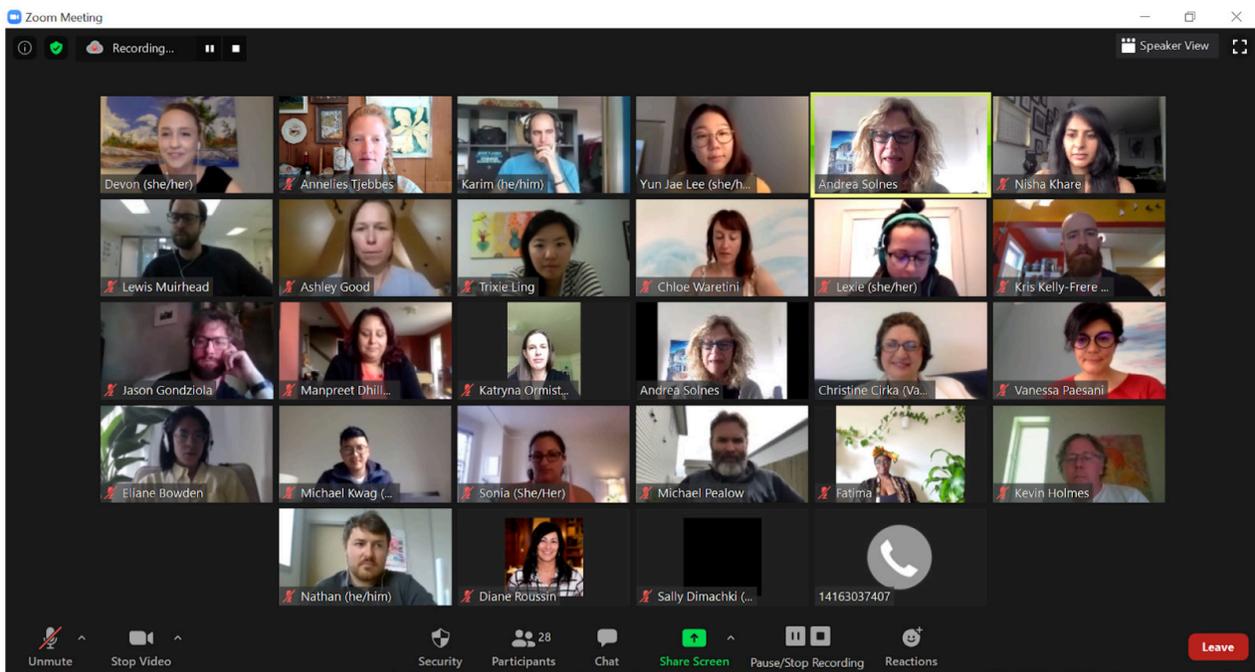
- Share their work with others including lessons learned and best practices
- Stay connected to the social R&D sector to know what is going on in this space
- Build connections with other practitioners that they may end up collaborating with
- Support the work of others through a Peer Input methodology
- Connect on challenging topics that need to be addressed by the field

Target

This stream of the CoP is being designed to serve a range of levels of practitioners who are eager to learn from and with one another.

Format

SI Canada will host bi-monthly sharing sessions for practitioners. Some will take on a similar format of some of the Peer Input Process sessions as well as the Open Space sessions from the National Practice Gathering. Others will include updates that will support practitioners to keep informed on what is going on in the field and identify opportunities for collaboration. Sessions will be facilitated by Social Innovation Canada or by guest facilitators. In addition, an online tool/platform will be leveraged to connect practitioners.



“I really appreciated the vibe and atmosphere you managed to create online. At first I didn’t like being put into a breakout room without having the choice to go to it or not, but in the end I’m glad it happened because I interacted with others more.”

Build Stream

Objectives

Practitioners in the Build stream have identified that their goals are to:

- Contribute to building the social R&D field
- Develop knowledge products that will help advance the social R&D field
- Provide leadership in addressing policy and funding barriers that are holding back the social R&D field

Target

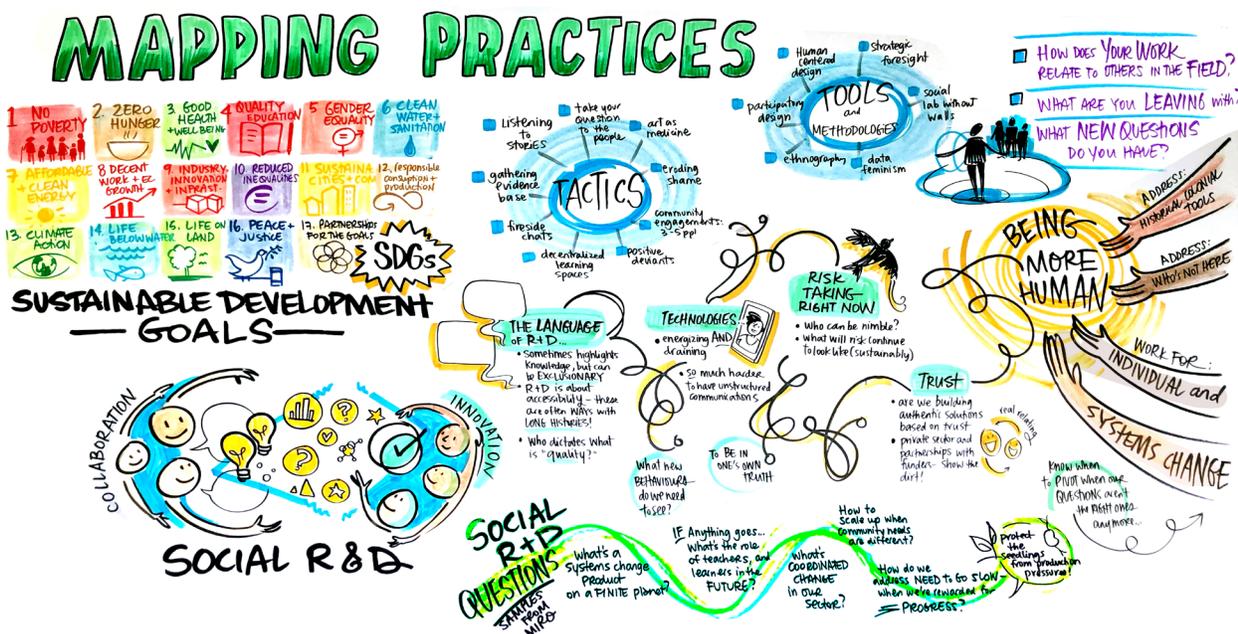
This stream of the CoP is being designed to engage more experienced practitioners who are eager to contribute towards building the social R&D field. In particular, this stream will engage members of the previous social R&D CoP that have already taken an active role in building the field or are looking to establish their role as thought leaders.

Format

Practitioners in this stream will be engaged on an as-needed basis to form working groups around specific projects. These working groups would support the development of tangible outputs and events to advance the social R&D field.

Examples of projects include:

- Providing input in the design of the social R&D practice gatherings and roundtables
- Developing and providing feedback on knowledge products to serve the field
- Addressing funding or policy issues that are holding back the field
- Contributing towards codifying and defining social R&D to include a diversity of methodologies and practices



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3. Knowledge Products

Knowledge Products are key resources that support the social R&D field and practitioners to learn and apply insights to evolve and expand their practice. A suite of social R&D resources already exists but needs to be shared and promoted so that we can increase their adoption. There is also a gap in resources that needs to be filled by the field. There is a wealth of knowledge and insights among social R&D practitioners and we are excited to leverage funds to capture and share some of these insights.



The work being undertaken to support the social R&D field will help codify and disseminate established and emerging methodologies, thus increasing accessibility and adoption of social R&D tools and resources among social purpose organizations.

Responding to Need

Field needs were identified through the Needs Assessment survey and pre-conference surveys to inform the development of key knowledge products that will support the field:

Library of tools

Case Studies

Equity-based tools

Social R&D primer

Strategic Recommendations

From the needs list above, the following Knowledge Product elements will be prioritized:

1. Library

- a. Continue to populate and draw attention to socialrd.org
- b. Conduct a resource gathering exercise to compile resources used by practitioners and to share links on socialrd.org and through the mailing list.

2. Equitable social R&D

- a. Support the development of Indigenous Knowledge Products developed in partnership with a working group of Indigenous practitioners.

3. Learn/Share sessions

- a. Resource the Learn/Share sessions to support facilitators and help capture insights from these sessions into usable resources.

Existing Projects

In addition to the additional knowledge products being invested in above, we will also continue to invest in the development of the following key resources for the field:

Case studies - Stories from the field

Overview: These case studies represent stories of social R&D in practice. We funded the development of five case studies at \$5,000 each with the goal of expanding the definition of social R&D among practitioners.

Prototype Evaluation Guide

Overview: This guide is in development by Mark Cabaj and is being reviewed and strengthened by a “Build” working group of the CoP.

Social R&D Facilitation Toolkit

Overview: This guide in development by Joshua Cubista will support facilitators seeking to apply social R&D, and organizations seeking to leverage different social R&D tools in their work.

“A PDF document with a tools list would be helpful for those newer to the field of Social R&D”

■ Conclusion

This event laid the groundwork for all upcoming efforts within the social R&D support project. It has stimulated a community, uncovered interests and needs from within and identified trends in the social R&D field. Many participants expressed gratitude for the learning and connections developed and also gratitude for insights about conducting online engaging convenings. Doug Brodhead from Innoweave shared that:

“This is the only event like this where my attention was captivated for the whole duration. The team did a great job of achieving balance and engagement”

Overall the feedback on the event was resoundingly positive and most participants expressed a strong interest in staying connected to this work through a community of practice or events mirroring this practice gathering. Next steps include continuing to capture and share the key insights from the event, nurturing the community and setting up for future opportunities for practitioners to learn from and with one another.

We are committed to strengthening the field of social R&D in Canada and engaging in ecosystem building activities that will enable this. We aim to support more practitioners to engage in the field and hope that our 2021 gathering will be an even larger, more connected and more impactful one.



“Oops, we forgot the keynote”

Breaking the mold of an online conference

By Annelies Tjebbes with support from the gathering design team

On June 16th and 17th, the social R&D community in Canada came together for a 2 day gathering to learn from and with one another. The global context within which we gathered was a challenging one, amidst a global pandemic, black lives matter protests calling for change in a racially unjust world, and a climate crisis left on the back-burner as news cycles are dominated by other stories. Over 200 participants joined this online gathering to explore the question:

How are Canadian social innovators addressing complex challenges in this changing time? How can social R&D tools and practices strengthen their efforts?

We’re not the first nor the last to have hosted a virtual gathering, but we’d like to share some insights and learnings that came from the experience and how we leveraged social R&D to design this event in a collaborative and experimental way. If you are eager to learn more, we’re happy to share insights over a virtual coffee.

We organized the gathering around key principles and this blog highlights what we tried and learned within each of the following areas:

- **Sharing the stage**
- **Cultural accessibility/Inclusion**
- **Collaborative design**
- **Holistic human experience**
- **Simple bold design**
- **Solid adaptable team**
- **Getting the tech right**

Sharing the stage

Intention: One of our core intentions was to shift power in the gathering and put the microphone into the hands of different, new, and diverse practitioners.

What we tried: We intentionally didn't have a keynote, nor did we include any lecture-style presentations. Instead, we encouraged dialogue, sharing (not telling), and co-creation of content.

Learning: *We heard feedback from some attendees that it took a lot of energy to participate in the gathering because it was so participatory. They expressed interest in having a few sessions where they could listen and absorb without feeling pressure to contribute and engage deeply.*

Intention: We sought to democratize knowledge in this gathering and not to own or define the social R&D field. This is an emerging field and a key goal of the gathering was to honour different definitions of social R&D and to support individuals to show, not tell about the work they are undertaking.

What we tried: During one session, we featured 15 storytellers who brought examples of social R&D in action across Canada. During another, we supported attendees to float up the most pressing topics that needed to be addressed for self-organized discussions.

Learning: *As a result of not seeking to define or own the social R&D field or language, some newer practitioners were left yearning for a strong introduction to the field. In future we will run a pre-gathering session to help onboard newer practitioners.*

Cultural Accessibility / Inclusion

Intention: Accessibility and inclusion were core focus areas for our design. We sought to expand and diversify the practitioners who engaged in this gathering and center and feature BIPOC voices.

What we tried: A majority of our session speakers and hosts were BIPOC. Some speakers addressed issues of racial injustice in our society and raised support of movements that are working to bring about positive change. We also shared this event through new channels and shifted it from an invitation style event to an open platform. By hosting it online and offering free or PWYC options we were able to open the event up to a much broader audience.

Learning: *While the session speakers and hosts were mostly BIPOC, our core design team was mostly white. We are committed to ensure that more BIPOC voices are at the next design table and to centering diverse voices and perspectives.*

Learning: *While we as hosts alluded to racial inequities and the revitalization of the Black Lives Matter movement, we didn't make a formal statement about these events and are committed to doing a better job at acknowledging our context and our support for these movements.*

“I feel like there are some really important voices that are still missing and I'm wondering how those voices can be brought in in a meaningful way.”

What we tried: Accessibility around language was also a core focus for us and we had bilingual (French & English) co hosts sharing contributions in English and French as well as live bilingual whisper translation being offered throughout the event.

Learning: *There are many more than just 2 languages used in Canada and will explore ways to feature and support Indigenous languages to be represented in future sessions and translation. We also know that it's not just about translating words, and that some concepts (including social R&D itself) don't translate as well into other language contexts.*

Collaborative design

Intention: In response to the rapid changes that are going on in the world we wanted to hold space for emergence and for sensing what would be needed at this moment for the field.

What we tried: We co-created this event with the established social R&D Community of Practice, an advisory committee, and with the input of interviews and surveys leading up to the event. We had different co-hosts from the Community of Practice join us for various components and this helped link the past work in this field and feature a variety of voices.

Learning: *We brought on an Indigenous facilitator to lead an opening exercise and ground us in relationships and the land. This was a beautiful start to the event and we are committed to putting more work into decolonizing the overall design of an event like this one in the future.*

Holistic human experience

Intention: It was important for us to counter zoom fatigue and to make this event was an engaging one that honoured the whole human experience and needs.

What we tried:

- We included music (by [Desirée Dawson](#)), movement (by [Restore Human](#)) and breathing exercises (by [Ravyn Wngz](#) with the [Laboratory of Artistic Intelligence](#)) during the opening and breaks.
- We had a [Drawing Change](#) graphic recorder who brought a visual element to the event.
- We made it an opt-in/out experience so participants could take care of other childcare, work and personal needs throughout the event and a concierge service if participants arrived during the middle of a breakout group.
- We leveraged breakout groups to make it engaging, interactive and personal.
- We even had a dance party!

Learning: *These were some of the most positively rated components of the event, but participants still shared that they were tired afterwards and yearned for full breaks to disengage. We also designed with 2hr slots and breaks between, but the overall experience of two back to back days was likely too much and we will explore splitting them up by a week next time.*

Simple Bold Design

Intention: Because we were designing from scratch in this virtual space, we had the opportunity to get creative with our design. We focused on keeping the gathering fairly simple and really nailing each component.

What we tried: We were bold in trying out creative engagement opportunities like open space and peer input processes and open about this experimentation so that participants felt part of the journey. We honed in on our objective around building relationships, and thus decreased the pressure for skills sharing which we now have the opportunity to take on in follow-up events.

Learning: *We gained a lot of key insights from the event and are still working to sum it up and share it back. We did planning in advance around harvesting for the event, but for next time we would place more emphasis on how we would leverage the outputs to share back.*

Solid adaptable team

One key element to our success was our solid design team ([Annelies Tjebbes](#), [Cédric Jamet](#), [Chloe Waretini](#), [Devon Bond](#), [Gabriel Reis](#), [Karim Rizkallah](#), Michelle Semple).

What we tried:

- We had each other's backs and did thorough walk-throughs to make sure we could cover for one another if needed. We didn't stick rigidly to roles, but instead jumped in for whatever was needed. For example on the first day when the MC's internet connection cut, another one of our team smoothly picked up her script and continued the show.

- For each session we had a lead on design and facilitation, and dedicated supporters who were ready to give feedback and support on the day. We could be bold because we knew that others would catch any balls we dropped without any shame or judgement.
- We adapted the design in the weeks leading up and on the day-of based on feedback.
- We laid ourselves bare and were open about tech challenges and changes we made.

Get the tech right!

What we tried: We hired a digital lead who helped us take care of the details along the way. We leveraged new technologies such as Miro to help make the event more engaging, but also stuck with tried and tested technologies like Zoom, google docs and google slides to make sure things were more familiar for participants.

Learning: *One tool we used (Miro) received polarizing reviews. Some were extremely excited to see all of the buzz and activity of participants and others found it overwhelming. Next time we would make it more clear that these harvesting tools are an invitation not a requirement so that people who love them can use them, and others don't feel pressured or intimidated.*

Conclusion

Breaking the mold, being design-led, keeping it simple, focussing on what matters and being prepared for emergence were all key elements to this convening. We are eager to facilitate another convening like this one in 2021 and can't wait to leverage the feedback we received to design an even better version 2.0. Here's to testing, learning and adapting!