Social R&D in Four Portraits: An Exploratory Study of the Emerging Field of Research and Development in Canada's Social Purpose Organizations

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ABSTRACT

Since 2015, Canadian practitioners and funders have been adapting research and development (R&D) principles and practices to the context of social purpose organizations (SPOs) to increase the trans-sectoral capacity to generate social innovations. As a result, Social R&D is rapidly gaining popularity among a diversified array of organizations. This article distills the findings of a mix-methods exploratory study and offers a typology of four different Social R&D conceptualizations and practices. An analysis of the literature and of the empirical findings indicates a general lack of shared understanding about what Social R&D entails as a concept or a process. Further precision of meaning is needed to judge of Social R&D's specific value or to responsibly support its implementation through policy.

RÉSUMÉ

Depuis 2015, un nombre croissant de praticiens et de bailleurs de fonds canadiens adaptent les principes de Recherche et Développement (R&D) aux réalités des organismes à vocation sociale (OVS) afin d'accroître la capacité trans-sectorielle à générer des innovations sociales. Cette démarche a rapidement permis à la R et D sociale de gagner en popularité auprès d'une grande diversité d'organisations. Cet article expose les résultats d'une recherche exploratoire utilisant des méthodes mixtes. Une typologie comportant quatre types de R et D sociale est détaillée. L'analyse combinée de la littérature et des données empiriques indique un manque général de compréhension partagée. Des clarifications conceptuelles additionnelles sont nécessaires afin d'identifier les apports spécifiques de la R et D permettant de justifier son support par la voie de politique publiques.

Keywords / Mots clés : Nonprofit; Social R&D; Research & development; Social innovation; prototyping / Secteur à but non lucratif; R et D sociale; recherche et développement; innovation sociale; prototypage.

INTRODUCTION

During the past decade and especially since 2015, in Canada, the U.S., and the U.K., Social Research and Development (Social R&D) has been described by its champions as a rigorous methodological framework through which organizations

can learn, adapt, improve, and invent new services that meet people's fast-changing needs (Mulgan, 2017; Rajasekaran, 2016; Schulman, 2017b). Frequently associated with experimentation for human service and policy improvement (Ryan, Schulman, & Rajasekaran, 2018), Social R&D is framed as a quintessential approach able to optimize the early stages of social innovation processes (Mulgan, 2019; Pearman, 2017). Moreover, Social R&D is presented as a bottom-up process that relies directly on the lived experience and involvement of the community and users who participate in the design and invention of new services (e.g., a digital knowledge brokering platform for connecting neurodiverse and neurotypical users [Pearman, 2019]). In a global context where innovation is widely perceived as a *sine qua non* condition of our ability to overcome complex social problems, it is perhaps unsurprising that Social R&D powerfully attracts people's curiosity (Tjebbes, Jamet, & Bond, 2020). This groundswell of interest inspired this exploratory mixed-methods study (Creswell & Plano Clark, 2007), which was guided by the following questions: What are the key features of Social R&D practices people identify? What types of actors and organizations engage in R&D practices? What does Social R&D add to the field of social purpose nonprofits?

A preliminary scan of the field (Desmond, 2014) included a review of numerous public reports, blog posts, trainings, and tools about Social R&D. Inspired by the influential work of the Social R&D Fellowship (Pearman, 2019), we define the concept as follows: Social R&D is the systematic generation and use of knowledge to develop and implement innovative solutions to social problems. Social R&D is a cyclical process composed of several steps structured around the following typical actions: the conceptualization of a problem, the identification of a research question, the design of a research protocol, the review of the literature and work of peers, prototype building and testing, prototype iteration, documentation, and the diffusion of learnings.

The key task of this research has been to distill four competing portraits of Social R&D circulating among practitioners, thereby highlighting synergistic and competing *conceptualizations* and *practices* that people describe as Social R&D in Canada's social purpose organizations (SPOs).[1] Social R&D is an emerging proposition. Beyond its popularity in certain networks of practitioners (e.g., Social Innovation Canada), philanthropists and policymakers (ESDC, 2019), no empirical research on this topic was found in the scientific literature. Furthermore, an initial scan of the field indicated important tensions between the various Social R&D conceptualizations and practices. Before the potential or actual value of Social R&D can be properly assessed, there must be clarity about what it entails and how it relates to existing frameworks. It is not responsible to import a concept from one context (e.g., R&D for industrial and technological innovation and profit generation) without a critical examination of its utility and adaptability for subsequent contexts. This article contributes to this important foundational work.

This article begins with a literature review on R&D for social purposes. It then describes the study's data collection methods, participants, and analytic strategies, and outlines the four distinct portraits of Social R&D that emerged from the convergence of qualitative and quantitative data. The article concludes by offering a way to amplify synergies and reconcile some of the tensions across the four portraits and signal their relevance for any national effort to cultivate a Social R&D policy and practice agenda.

LITERATURE REVIEW

Technology focused R&D serving commercial and military purposes has been discussed extensively in the academic literature (Freeman & Soete, 1997; Jain, Triandis & Weick, 2010; Knott, 2017). Based on the 2015 *Frascati Manual* published by the OECD, Statistics Canada uses the following definition: "Research and experimental development (R&D) comprise creative and systematic work undertaken in order to increase the stock of knowledge—including knowledge of humankind, culture and society—and to devise new applications of available knowledge" (Canada, 2019). Canada started measuring R&D activities in the nonprofit sector around 2000, but the metrics focus on "science and technology activities" (e.g., in

nonprofit research institutes). They are not, therefore, suited to properly capture the various emergent R&D-style activities of SPOs, which are categorized as social service delivery organizations operating outside of "science and technology" (Goulet-Langlois, Nichols, & Pearman, 2020; National Research Council, 2015). Since 2015, the notion of Social R&D has aimed precisely at filling this void by bringing visibility to these emerging practices, which are considered to resemble industrial R&D patterns (Rajasekaran, 2016). An initial scan of the academic literature, however, did not reveal recent peer-reviewed content about Social R&D. Eventually, a scrutiny of U.S. federal policy documents uncovered a first wave of peer-reviewed and grey literature focused on Social R&D that spans approximately from 1960 to 1990. A second wave of non-peer-reviewed content, spanning 2010 to 2020, was also identified. Discovering this first wave proved to be a challenge since no author from the second wave referenced the work of the first wave. It is, in fact, a 1977 report titled *Social Research and Development of Limited Use to National Policy Makers* (United States General Accounting Office, 1977) that made it possible to identify the emergence of Social R&D as a federal policy construct in the United States aimed at forging the "missing link" between the social sciences and the resolution of social problems in public sectors such as education (Bailey, 1970), social work, and corrections (National Research Council, 1978). The first finding is, therefore, that Social R&D has a much longer history than many contemporary authors seem to be aware of. A second important finding is that the first scholar to have theorized and codified Social R&D as a methodological framework is Jack Rothman (1980) in *Social R & D: Research and Development in the Human Services*. Social R&D, defined as "the application of industrial research and development techniques to problem solving in the human services" (Rothman, 1980, p. 2), was presented as a paradigm shift, whereby the goal of the social sciences was not only to produce knowledge but to actively transform this knowledge into "social technologies," such as treatments, practical methods, or devices that practitioners could directly use or apply (Kirk & Reid, 2002).

Contemporary research genres such as intervention research (Rothman & Thomas, 1994), educational design research (McKenney & Reeves, 2014), and design and development research (Richey & Klein, 2014) can all be linked back to this early conception of Social R&D. As Table 1 shows, Social R&D and similar contemporary research genres contrast with applied social research and human service practices because they bind research and service development into the same process conducted by the same team.

Table 1: Comparative table of processes

Type of activity	Applied social research	Human service practices	Social research and development
Step 1	Problem formulation	Problem assessment	Problem formulation and research design development (e.g., literature review)
Step 2	Research design development (e.g., literature review)	Formulation of an intervention strategy	Data collection and data analysis
Step 3	Data collection	Implementation	Prototype building
Step 4	Data analysis	Evaluation	Prototype testing and prototype iteration
Step 5	Drawing conclusions	Closure	Implementation of satisfactory prototype and evaluation
Step 6	Public dissemination of results	Documentation and dissemination	Documentation, dissemination, and or promotion with the intent of scaling

Source: This is an adaptation of a table in *Applied Social Research: A Tool for the Human Services* (Monette, Sullivan, & DeJong, 2008). It is a codification and generalization of the main steps structuring each process.

An applied social research process does not involve intervention development. Human service practice often formulates an intervention on the basis of research evidence, but no formal research process is undertaken. In a Social R&D process,

research not only grounds the formulation of an intervention strategy but this strategy is elaborated through the progressive development of a prototype. This offers the advantage of implementing an intervention (Step 5) that is not only based in evidence but also field-tested and, therefore, more likely to result in successful implementation. In other words, the prototyping phase accelerates the adaptation of the intervention; instead of implementing and then evaluating a full version of the intervention, the successive iterations of a (small-scale) prototype of the intervention provide learnings more rapidly and at less cost (York, 2011). As simple as these distinctions may sound, Rothman (1980) affirmed this linkage between research and development to be "a significant conceptual breakthrough" (p. 3) because it offers an efficient alternative to "the uncoordinated, and often conflicting, collections of program people and researchers who typically generated and evaluated new interventions" (Kirk & Reid, 2002, p. 116). Overall, this first wave of literature is clearly limited to the initiatives of policymakers and scholars who sought to transpose the very successful industrial R&D practices in order to bolster the ability of social sciences to solve social problems.

The second wave of literature (2010–2020) is produced by authors who do not see themselves primarily as academics but rather as practitioners, public servants, or consultants, often working for intermediary organizations and philanthropic foundations operating in the nonprofit sector (Mulgan, 2019; Pearman, 2019; Rajasekaran, 2016; Schulman, 2017a; York, 2011). Having emerged independently from the first literature wave, the second wave is directly influenced by bodies of knowledge pertaining to social entrepreneurship and social innovation. As in the first wave, Social R&D in the second wave plays a double function: it is tacitly used for policy advocacy purposes and methodological guidance.

As a policy advocacy construct, Social R&D is foremost an attempt to problematize the unbalanced allocation of state resources between the for-profit and nonprofit sectors; while industrial R&D is unquestionably supported by the state (Council of Canadian Academies, 2018), the ability of social purpose nonprofits to not only deliver services but engage in research and development is scarcely supported. This is especially problematic considering that many social problems are caused by industrial and commercial developments (Kher, 2016). Following this logic, authors such as Jason Pearman (2017) and Vinod Rajasekaran (2016) consider that in its present state, the SPO sector is unable to keep up with the increasing complexity of social needs and, therefore, sustained investments in the creation of a nationwide Social R&D infrastructure are necessary (Schulman, 2017b). Granted that (industrial) R&D is well accepted by policymakers, rebranding the heterogeneous multiplicity of research-type and development-type activities in the SPO sector under the umbrella of *Social* R&D is seen as a strategy to convince policymakers of the importance of such investments. As a policy advocacy strategy, and similar to R&D as an accounting category in the for-profit sector, Social R&D is a very broad and inclusive notion that encompasses any type of SPO-based practices linking, more or less directly, forms of research to forms of development (Tjebbes et al., 2020).

An additional key strategy to consolidate Social R&D's legitimacy has been to associate it with well-accepted notions such as innovation or social innovation. Social innovation has also been widely integrated in policy frameworks in recent years (Browne, 2016; Durand Folco, 2019; Employment and Social Development Canada, 2019), and a Social R&D process is presented as a rigorous framework that structures the first stages of a longer social innovation process. Social innovation is an elusive and highly contested concept in the literature (Fougère & Meriläinen, 2019; Marques, Morgan, & Richardson, 2018), but it can be defined as "a complex process of introducing new products, processes or programs that profoundly change the basic routines, resource and authority flows, or beliefs of the social system in which the innovation occurs" (Westley & Antadze, 2010, p. 2). Such definition is directly based on linear innovation models produced in business and economics departments (Maclaurin, 1953; Rogers, 1962; Schot & Steinmueller, 2018), and its key contribution resides in the theorization of the several typical steps that range from the localized invention of a new initiative to its wide-scale adoption (e.g., production, marketing, distribution, etc.). Since Social R&D pertains to the early stages of an innovation process (NESTA, 2018), it focuses on idea generation, prototype building, and experimentation. In other

words, it focuses on the achievement of a localized invention (i.e., turning ideas into tangible things). Once a successful prototype of the invention is achieved, it must, in order to become an innovation, go through several other stages of the innovation process (e.g., policymaking, large-scale skills building, organizational changes, etc.), which are out of the scope of the R&D process per se.

Such considerations lead to the methodological function of Social R&D. As a cyclical process involving several typical steps and drawing on a wide array of scientific methodologies, Social R&D prescribes a more "robust" way to organize the invention work on the ground and in SPOs (Pearman, 2019; Ryan et al., 2018). In alignment with innovation systems theories (Rodríguez-Pose & Crescenzi, 2008), the sector-wide generalization of R&D practices is believed to increase the chances that such inventions become innovations. In other words, Social R&D is not only about allocating more resources for the early phases of an innovation process but also about *how* such early phases should be conducted (see Table 1). Furthermore, as is common for industrial R&D, Social R&D mobilizes a variety of methods and methodologies: "Social R&D draws heavily on strategic inquiry. … It uses diverse methods, including behavioural science, randomized control trials, lean prototyping, positive deviance, and ethnography" (Ryan et al., 2018). Seen this way, Social R&D is an intrinsically multidisciplinary approach that can borrow from any discipline to meet the contextual needs of a given project. This characteristic is argued to make Social R&D methodologically superior to approaches confined to a single discipline.

Beyond all the above elements that situate and clarify social R&D's argued value, many gaps were identified in the grey literature. First, a distinction between Social R&D as a policy notion and as a methodological notion is not signalled explicitly, producing ambivalence about what the notion entails exactly. Second, except for Rothman (1980) and InWithForward (2019a, 2019b), very few Social R&D projects have been documented in detail; only one non-peer-reviewed report showing statistical evidence of Social R&D's ability to increase organizational performance was found (York, 2011). Third, beyond the idea that Social R&D is a multidisciplinary approach, its comparison with similar methodologies (e.g., human-centred design [IDEO, 2015], knowledge to action [Graham, Logan, Harrison, Straus, Tetroe, Caswell, & Robinson, 2006], action research [Coghlan & Brydon-Miller, 2014], or social innovation laboratory [Westley & Laban, 2015]) that also directly link research steps to development steps remains unexamined. Fourth, some reports tend to label the activities of organizations that do not actually use the notion of Social R&D at all in their documentation (Mulgan, 2019; Rajasekaran, 2016). Fifth, the literature of the second wave is devoid of critical reflections about political and ethical issues. This is especially worrisome because an examination of the grey literature showed that Social R&D reflects and normalizes dominant neoliberal rationalities, such as an emphasis on experimentation as a remedy for bureaucratic unresponsiveness; entrepreneurship and market-based strategies to answer social needs; industry partnerships (Browne, 2016; Durand Folco, 2019; Fougère & Meriläinen, 2019; Laville, 2019; Marques, Morgan, & Richardson, 2018); and managerial technologies associated with the New Public Management (Evans, Richmond, & Shields, 2005; Joy, Shields, & Cheng, 2019). This empirical investigation is structured around those five main gaps.

METHODOLOGY AND METHODS

This mixed-methods study was designed as an exploration of the R&D activities of people working in Canada's SPOs. In accordance with exploratory study designs, this study was conducted as an initial scan of activities that have not been the focus of previous research; and a first step to inform subsequent research activities (Babbie, 2010; Reiter, 2013; Schutt, 2018; Swedberg, 2020). The decision to apply a convergent mixed-method design (Creswell & Creswell, 2018) aligns with an interest in obtaining a general understanding of R&D practices on a national scale, and a desire to document the Social R&D discourses and practices of those experienced individuals providing Social R&D support to other SPOs.

Research participants and data collection procedures

These two synergistic research interests led to the identification of two different sample groups and methods. The first sample population (*n* = 49) is composed of SPO practitioners and managers who self-identified as interested and/or involved in forms of research and or development activities through an anonymous online survey. The survey was distributed via a link to social media (e.g., the personal Twitter accounts of the authors) and through five topical email lists (e.g., on Social R&D or Social Innovation) selected for their wide geographical coverage. The survey was designed to understand: Who is engaging in R&D practices and for what purposes? What types of R&D activities do they undertake? What are their self-determined R&D needs and strengths? The survey was distributed in English and French. Survey respondents, located across eight different Canadian provinces, are distributed among the following categories: CEOs and directors (*n* = 30), middle managers (*n* = 9), trainers, mobilizers, consultants (*n* = 6), board members (*n* = 3), and volunteers (*n* = 1). No frontline service staff took the survey. Ninety-four percent of survey respondents[2] self-reported that they were familiar to very familiar with Social R&D, and the vast majority considers Social R&D practices to be significantly (45%) or somewhat (41%) embedded in their organizational practices. Moreover, 73 percent of respondents worked in nonprofit SPOs.

The second sample population (*n* = 15) was purposively comprised of people who work in 13 intermediary organizations that offer R&D training and consulting and/or who work in partnership with SPOs. Intermediary organizations provide services to other organizations to build capacity (e.g., data collection and management or impact evaluation) (Dekker, 2010). Three of those 15 people were working for organizations that are also funders; 13 people were based in Canada; one person was based in the U.K; and one person was based in the U.S. Respondents are distributed among the following professional roles: CEOs and directors (*n* = 6), research managers (*n* = 4), trainers, facilitators, and content producers (*n* = 5). Interviewees were selected because they are involved in the execution, management, and/or application of research as part of a cycle of organizational or sector innovation, learning, and change. Nine interviewees had sustained engagement with Social R&D as an explicit and distinct framework. Interviews ranged from 40 to 120 minutes long. They were audio recorded and transcribed verbatim. Like the survey structure, the interview guide was organized to solicit information about participants' profiles, organizational context, and current R&D practices; their R&D needs (e.g., time, funds, workforce), strengths (e.g., risk tolerance), and available resources; and their knowledge and experiences of R&D capacity-building efforts for nonprofit SPOs. Because each intermediary organization works with numerous organizations, their insights were likely informed by a wider breadth of experiences than would be the case among survey respondents who could speak only to the experiences of their own organizations.

For three of the 13 intermediary organizations that participated in this study, site visits (three to five days each) were conducted to learn more about organizational functioning. Field notes were produced for each visit and a range of institutional documents were reviewed (e.g., web-based resources, project descriptions). The field observation sites were chosen on the basis of geographical distribution across Canada (e.g., Montreal, Toronto, Vancouver), the diversity of language (i.e., French and English), and organizational expertise with applied social science and/or Social R&D processes.

Data analysis

The three data sources (field observations, semi-structured interviews, and the survey) were first analyzed separately and then cross-referenced to generate findings. Quantitative data were analyzed descriptively—an approach that corresponds with the sample size and the objectives of an exploratory study. Qualitative data (open-ended survey question results, interviews, and field notes) were analyzed thematically. Thematic codes were developed inductively from initial reviews of interview transcripts and deductively, based on the original study questions, to create a codebook based on predetermined and emergent themes. The codebook was pilot-tested by the three authors of this article (using two test-transcripts), modified, and tested to confirm the relevance and comprehensiveness of the coding structure. Once the codebook was finalized, all qualitative data were coded again using Nvivo.

Four portraits of Social R&D were mainly identified based on terminology criteria. The survey data mapped surprisingly well on the interview and field visit data; across the three data sources some participants were explicitly using industrial R&D terminology, others were claiming to engage in Social R&D practices but were not using this industrial terminology, a third group was conducting sophisticated social science activities corresponding to Social R&D as a policy notion, but were not using social R&D terminology. The fourth portrait provided an outlier that was clearly rejecting Social R&D terminology. The interview and field visit data were then used to deepen analyses of each ensemble. Such categorization proved able to cover all the data and thereby nourished the central analytic strategy leading to this preliminary typology of the field.

FINDINGS: FOUR PORTRAITS OF SOCIAL R&D

The objective of this article is to synthesize and describe the various *conceptualizations* and *practices* people associate with Social R&D in Canada's SPOs. The four different portraits represent distinctive lexical habits (i.e., different discursive structures) and methodological orientations, even as some aspects of the portraits overlap. Overall, Portrait 1 is inspired by technological innovation, entrepreneurship, and business practices. Portrait 2 is focused on enabling organizational and community development, with an emphasis on professional practice transformation. Portrait 3 is influenced by social and health sciences research and knowledge mobilization approaches. Portrait 4 is influenced by grassroot community organizing.

Portrait 1: Social R&D inspired by start-up entrepreneurship and technological innovation processes

Portrait 1 is represented by 33 percent of survey respondents, one site visit, and five participants interviewed in five different organizations. This portrait offers a view of Social R&D inspired by R&D processes in the business development and technological sectors. In these sectors, R&D is considered an essential activity designed to generate new or improved products and, thus, maintain competitive value and profit. Two participants interviewed had experienced what they describe as the "bold and ambitious culture of the Silicon Valley" (field notes from site-visit number two).

> I mean, mostly I was inspired by things outside the social sector. And so obviously read a lot about Bell Labs, and I've had friends, lots of friends, that have worked at Google and trying to understand how they had set up all of their different structures for internal innovation … just the range of, the kind of incubator and more venture capital-style approaches to doing R&D. (Participant 13)

Witnessing all the resources, inventiveness, expertise, and boldness corporate firms use to invent new products and services, participants in this portrait believe that SPOs should benefit from this spirited and well-resourced way of doing things. Participants all anchor their conception of Social R&D in a linear model of innovation (Schot & Steinmueller, 2018) according to which R&D, also referred to as the "experimentation spine" or "invention arc," is as a cycle meticulously geared toward the invention of new products or services. Some participants describe this cycle as having three main phases, and others provide definitions with six phases. But the key element is the core logic of a systematic progression from one phase to the next until the cycle begins again. The following quotation illustrates this recurrent logic:

> I think the spine for R&D is similar across many sectors … you want to start off with a solid hypothesis. Like a problem to solve, a hypothesis about a potential solution, an experiment of some sort that allows you to prototype and gather some data. And then it's rinse and repeat as many times as you need, and then you customize that to the scale and size of the problem and amount of resources available to you in … the local community that you're trying to serve. I think it's the experimentation spine that is the most important to keep constant across all of the different ways that you can do this. And then within that, you're going to, depending on your hypothesis, depending on the problem, depending on the design of the prototype, you're going to mix and match a bunch of other tools. (Participant 12)

This quotation exemplifies how participants in this portrait conceptualize Social R&D as the application of (industrial) R&D processes in the realm of the SPOs. The iPhone and Netflix were cited as examples of breakthrough innovations.

In fact, interviews revealed that Social R&D is conceptualized as a critique and remedy to shortcomings and weaknesses attributed to social innovation practices: "So I really felt like a lot of the superficiality that I was seeing in the social innovation space in Canada would be helped by trying to build up this [Social R&D] functionality" (Participant 5). While in the literature Social R&D and social innovation appeared as complementary notions, the interview data for Portrait 1 opposes them.

Participants perceive social innovation practices as insufficiently anchored in scientific practices and as affected by a naïve and erroneous conceptualization of innovation: "Why R&D? Why not social innovation? And I kind of, just philo-sophically so you know my bias, I settled on R&D partly because I kind of believe in science, number one. And number two, with innovation it's, like, you can't guarantee innovation" (Participant 12). Because participants feel like mainstream conceptualizations of social innovation are too vague and not sufficiently supported by well-tested approaches, they prefer to rely on widely adopted notions and practices found in the for-profit sector: "[R&D] has a real method to it, and it's a function, it's not a workshop. So, you have R&D departments or units. It's a structural part of how private sector does its business, and they recognize you need people to run R&D and not just deliver things" (Participant 13). Participants insisted that social innovation practices are too often about ideas, values, or intentions and not enough about methodol-ogies leading to tangible products or services. They also insisted that, in contrast with most social innovation initiatives they witness, Social R&D work has to be rigorously informed by the scientific literature: "So I just wish the sector would actually understand that to do R&D, you need content. [laughs]" (Participant 13).

The emphasis on content, methodology, and tangible outputs is consistent with the central role of the prototyping step identified during field observations. Once key needs are identified, a multidisciplinary team of experimenters comes up with a potential solution to address those needs. Most often relying on approaches commonly found in the field of design (e.g. human-centred design [IDEO, 2015]), they then proceed to build a material and tangible version of this idea: a pro-totype. The prototype is tested in "real life" experimental circumstances that will allow adjustments and improvements. A distinguishing feature of the Social R&D process, compared with corporate R&D processes, is the involvement of stake-holders in the ideation, prototyping, and testing phases: "I think part of the other reason of the importance for the R&D too is to actually talk to the people who have the lived experiences" (Participant 14). The intensity, nature, and quality of the involvement of potential users varies. In general people aspire to a bottom-up approach, even though the ownership of the project and prototype is ultimately held by Social R&D teams. They consult the community, observe, and gather information (e.g., about needs and constraints), but in contrast with certain types of community-based action research (Coghlan & Brydon-Miller, 2014), final decisions are made by the R&D team. As the prototype is tested and additional in-sights are collected, teams leading the experimental phase will produce several iterations of their prototype solution. Some iterations might be abandoned, new prototypes might be created, and the process will go on until the prototype reaches a satisfactory state, allowing the team to move to a solution implementation phase.

As such, a common feature of this first portrait of Social R&D is a high tolerance for risk and failure. Indeed, as many participants shared, experimentation implies risk-taking. Participants talked about the importance of "safe-fail experi-ments"—that is, "small experiments [that are] non-threatening" (Participant 14). Risk tolerance, in this sense, reflects a comfort level with the idea that resources, efforts, and time will be invested, potentially without yielding a functional and useful product. The centrality of risk-taking in this approach is to be understood in contrast with plan-based approaches (e.g., human-service intervention in Table 1) in which all the steps and actions of a project would have been planned from the start (Hassan, 2014). R&D processes are based on attempts, trials, modifications, and iterations; outcomes can never be guaranteed. More importantly, failures are often considered to be as much a great source of learning as suc-cesses. The working culture and structural supports need to be aligned with this risk of failure: "agreeing to a failure rate that everybody feels comfortable with … at what rate are you willing to fail, right? So, is it 80% of the time? That's kind of the Silicon Valley backdrop" (Participant 10).

Embracing failure also means that R&D has a significant cost. Participants agreed that quality Social R&D is expensive. On average, experiments are structured over 6-to-18-month time frames. Often additional time is needed. For organizations that are bonded to service delivery and performance outcomes, a quality Social R&D approach thus seems inaccessible. Social R&D experiments are not only expensive, they typically do not yield the kind of results that can be measured in conventional ways: "Whatever metrics you're using to measure the existing nonprofit outcomes, these do not apply to R&D" (Participant 5). Adopting a Social R&D approach thus involves a conceptual and practical shift away from the logic of outcomes-based planning toward learning and experimentation. Indeed, many of the participants who contributed to constructing this portrait view Social R&D as a craft, some even say *"a whole sensibility and a lifestyle"* (Participant 13) that necessitates a specific working culture. Participants also noted that without immersion in this culture, it is very hard to imagine that managers or practitioners will acquire the level of cultural and technical competency associated with this version of Social R&D.

A social entrepreneurship mindset and management style is an additional defining characteristic of Social R&D according to this group. Teams need to generate inventions, but they often need to convince others of the worth of their solution, find financial partners, get rid of potential obstacles between the solution and the targeted adopters, create a new organization, and so on. One participant explained how entrepreneurship from the Silicon Valley energized and inspired her: "this sense of entrepreneurialism that often is naïve, but it is … there's just a boldness—I guess that's the best word for it—and a sense of can do-ness … there's a huge amount of arrogance to it, but it's also quite inspiring to be around" (Participant 13). Some interviewees talked about the importance of being "opportunistic," others mentioned start-up incubators as inspiration, and still others cited venture capitalism as an inspiring funding mechanism to stimulate innovation. In all cases, an entrepreneurial approach was viewed as a remedy to slow-moving and old-fashioned bureaucratic and academic processes.

Portrait 2: Social R&D as organizational development and community empowerment
Conceptualizations and practices
The second portrait reflects 47 percent of survey respondents, one site visit, and the experiences and observations of four participants from three different organizations that use Social R&D as one of a few frameworks to characterize the various forms of research and/or development they engage in. This group seldom explicitly describes their work as located within a Social R&D frame, unless they are producing a grant application, in which case the frame is used instrumentally to ensure their proposal is seen as evidence-led and innovative. Interview participants associated with this portrait explain that they have been increasingly engaged with a Social R&D frame throughout the past four years. Overall, and in alignment with Social R&D as a policy advocacy construct discussed in the literature review above, this portrait offers a very inclusive conceptualization akin to a broad umbrella under which a variety of research and/or development activities can co-exist.

An examination of the recurring key terms used by interview and survey participants provides a good anchor point to understand how Social R&D is conceptualized. Participants often use the terms *Social R&D* and *experimentation* interchangeably, with a focus on experimentation being central to people's conceptualization of Social R&D. Experimentation is employed in the broad sense of trying new things and learning from them, even if they do not yield the expected results. The term is not used to refer to the use of experimental development designs in scientific research (OECD, 2015) or the process of testing a prototype in a controlled process with multiple iterations. Rather, people employ a generous notion of experimentation as an ideological orientation to trying new things.

Furthermore, the focus on experimentation was associated more broadly with the concept of social innovation, rather than a specific feature of a Social R&D approach. Unlike those in Portrait 1, the distinction between invention and the innovation characteristic of linear models of innovation was rarely mentioned. Three out of four participants interviewed

did not identify a clear contrast between Social R&D and social innovation; rather, both terms were used to signal the objective of finding better and new ways of addressing social issues. Indeed, participants use a range of terms (e.g., program quality improvement) to talk about their Social R&D practices, affirming people's inclusive use of the concept.

In general, and despite the flexible use of terms to describe particular research or action efforts, participants define Social R&D as structured over two distinct phases: a research phase and an action phase. Unlike the version of Social R&D put forward in Portrait 1, there was no mention of cycles or arcs and no mention of a specific process or craft. The two phases are linked according to the following logic: research *at the service of* development or (put differently) research *for* action. Interviewees also implied that those phases are dialectically related since practice challenges research as much as research corrects practice. Where the first group explained Social R&D as a cycle binding several phases, the second group described a dynamic movement or oscillation between the research phase and the development phase: "Well basically, for me, there are really two components one is research and the other one is development" (Participant 1). Within each oscillation (research or action), people outline different typical actions structuring their work.

The research phase: Understanding the context, mapping the issues, finding inspiration
Most participants conceptualized research in a very generous way—that is, not strictly in a social scientific sense of the term. Only one interview participant's work was inspired more directly by social science research designs and methodologies. Rather, people talked about research as an opportunity to understand the context of their field by talking with other practitioners or participating in a community of practice; mapping the issues through observations; talking with other staff and community members; reading reports; and, finally, as a process of finding inspiration by learning from similar organizations. Instead of focusing on particular methods or methodological orientations, people represented in Portrait 2 insist on the function that research plays in their work: "it provides a shift in perspective and an opportunity to pause, reflect, and learn from things that are/are not working" (Participant 11).

The development phase: Organizational learning and practice change
An analysis of the interviews and field visits to the intermediary organizations (Dekker, 2010) in this group attests that their development-oriented work largely seeks to transform the practices of professionals and managers in partner organizations. This focus contrasts with Portrait 1 because people in Portrait 2 do not conceive of their development work in terms of the development of a product; rather, the focus is on shifting people's thinking and actions. Terms such as *prototype* or *service-concept* were rarely used to identify the focus of development. Instead, participants spoke about developing new practices, new approaches, and opportunities for people to critically examine power relations together. The development or action work focuses on skill and knowledge building to transform social services and institutions in equitable and just ways:

> R&D … it's been very much focused on developing new ways of doing and practicing. So … how do you map a territory to understand its dynamics? How do you … so some practices already existed, but how to change them so that a group can do it together, collectively, and learn from it. (Participant 1)

For those whose perspectives are represented in Portrait 2, R&D efforts enable internal and external organizational learning with the ultimate aim of creating more just institutions and organizations.

The objectives guiding Social R&D processes
The activities and conceptualizations described above are organized around achieving three key objectives: enabling fund-seeking and organizational legitimacy, valuing lived expertise and empowering citizens, and transforming practices and social systems. For many organizations, especially those seeking to transform social systems through socially innovative practices, the pressure to develop new practices and programs is relentless. But SPOs often lack the time and

economic resources to ground their development activities in evidence. Social R&D, with its explicit emphasis on research, is viewed as a framework to help meet this requirement.

In Portrait 2, Social R&D was also framed as a way to systematically involve stakeholders in service development and improvement efforts. Among those represented by Portrait 1, stakeholder involvement is compatible with the idea that Social R&D involves esoteric and technical skills; among those represented by Portrait 2, Social R&D is conceptualized as an approach that shifts the expertise from professionals to citizens or community members. In other words, participants in Portrait 2 were less focused on the importance of technical expertise and emphasized the centrality of lived expertise or experiential knowledge. For example, the interviewee who said, "*Social R&D* means rethinking who owns the expertise … it's a vector or a capacitor or a facilitator to help people access their own expertise … as facilitators we are experts at being non-experts" (Participant 4), had public consultation exercises and small-scale voluntary neighbourhood projects in mind. Likewise, another participant insisted that Social R&D be built on "a will to put well-balanced participatory processes in place that foster the real participation of concerned actors" (Participant 15). Participation is viewed as paramount to improving people's understanding of the issues and the context for which improved or new services are being created.

All of those represented by Portrait 2 saw the purpose of Social R&D as stimulating "systems change" or "social transformation," saying things such as "we don't do R&D in the perspective of innovation. We do it rather in the perspective of change or transformation" (Participant 11). Keenly aware that R&D was consolidated in profit-driven environments, participants in Portrait 2 distinguished their work as neither oriented to product development nor seeking innovation for innovation's sake. Making professional practices progressively change and evolve in institutional settings was consistently named as the main approach to achieve social innovation: "Since the start our perspective on this is to try to contribute to the ongoing transformation of institutions" (Participant 15). This approach starkly contrasts with the expert development of "breakthrough innovations" associated with the first portrait.

Portrait 3: Social innovation through social science research and policy change

Portrait 3 aligns with 16 percent of survey respondents and represents the views and practices of people who hold research leadership positions in three partner organizations (a social innovation lab, a national coalition, and a university-based research centre) that were observed jointly during a field visit. People associated with Portrait 3 do not employ Social R&D to describe their work, even though the process of their work is compatible with Social R&D as a policy notion. The five interview participants associated with this portrait were unable to define Social R&D in their own words, even though they had heard their work described in this way by their CEOs. Three interviewees had PhD-level backgrounds in the social or health sciences and were well versed in a variety of research methodologies. The other two interviewees were experienced capacity builders who specialized in knowledge translation and knowledge mobilization.

Each of these interview participants played a specific role in a large and multifaceted research-to-impact project, including a social innovation lab and a national demonstration project. The organizations are seeking to implement, test, and adapt program and policy interventions with the hope of transforming an entire sector from a largely crisis-oriented response to a prevention-oriented one. The project is structured by three interrelated activities, conducted over several years: research and evaluation; capacity building, knowledge mobilization, and technical assistance; and changes to the implementation and delivery of services. These sets of activities function in a cyclical fashion to enable adaptations and improvement based on the evidence found in the ongoing research effort.

> [It] is a partnership model where one organization … is kind of responsible for the research, communities are responsible for delivering the programs and taking the research and evaluation results and helping implement the changes. (Participant 6)

This overall cycle design was directly inspired by a knowledge-to-action approach that was initially developed for the health sector (Graham et al., 2006) and a community-based evaluation structured in two phases: developmental or formative evaluation and outcomes evaluation. The developmentally focused evaluation activities are described by participants as "building [people's] capacity for evidence-based practices" (Participant 3).

In this case, the intervention being tested is not a single new product or a prototype (like in the first portrait) but a range of programs and initiatives developed to address a long-standing social problem. The intended innovation is a shift in the ways of working across an entire sector, enabled by the adaptation, implementation, and testing of programmatic and policy interventions on a national scale: "How can that program that's working in Vancouver that seems to be having success with Indigenous youth, how can that be reimagined in Winnipeg where there is still a high population of Indigenous youth?" (Participant 8).

For this group of actors, the implementation process is akin to a testing phase during which researchers monitor what works and what does not and then share this information with stakeholders who then make changes at the service delivery level. This iterative process goes on until programs are stabilized, at which point an outcomes evaluation is conducted to examine if they led to a desirable change. While people represented by Portrait 3 did not describe themselves as explicitly undertaking a Social R&D cycle, they were enthusiastic to learn more about it. Once provided with a definition, they quickly made connections with research methodologies they were more familiar with.

Indeed, despite using a different discursive register to describe their work, this large-scale project focused on hypothesis testing and ongoing waves of research and action to generate new services resembles smaller-scale processes described in Portrait 1. However, for most in Portrait 3, a lingering question remained: beyond an affinity vis a vis their current research-to-impact approach, what does a Social R&D frame offer that existing change-oriented social science methodologies fail to provide?

Portrait 4: The outlier

The fourth portrait reflects the views of a single participant (as well as 4% of survey respondents) and is included here because this person employed discursive resources and spoke of practices that directly opposed the use of Social R&D to describe work in what he considered relevant Canadian grassroot SPOs. This portrait does not follow the same organizational trajectory as the ones before; this is not to generalize practices or terms but to acknowledge a current of skepticism running through many of the data. This participant, "Participant O," has worked as a community organizer and organizational capacity builder for 20 years. He has extensive experience in popular education projects, in rights-focused and advocacy organizations, and has PhD-level research skills. The historically situated analysis offered and the nuanced issues raised by Participant O are important to consider as scholars, funders, and governments investigate the potential pitfalls of Social R&D for Canadian SPOs.

Participant O's rejection of the specific Social R&D lens should not be interpreted as a rejection of research and/or development practices in general nor complacence with the status quo. He confirmed that most of the skills and knowledge he understood to be under the umbrella of Social R&D were important and useful:

> When you look at it as a skill set, it's not a bad premise and, for sure, there are strong benefits to doing your shit well and to really learning from what it takes to either run an organization or to do strategic planning or how you learn from what other people in your context are doing, to be stats-aware and stats-reliant in the context of your work. None of those things are bad. (Participant O)

For Participant O, the problem is the overall narrative of the framework, the fact, for example, that it seems to prioritize innovation over time-intensive relational work and sidesteps a "whole set of social critiques" and learnings that were hard

won by social movements. In contrast to what he interpreted as the politically consensual and problematically promotional narratives characteristic of Social R&D as formulated in the grey literature, Participant O passionately argued for the adoption of community-owned research, governance, and decision-making practices that prioritize equity, affirm dissent, and keep alive the hard-won learnings of a history of social struggles.

From his perspective, grassroot organizations have a long and inventive history of knowledge production and pattern breaking shaped by multiple forms of research and/or development activities, even though they may not have been associated with an explicit Social R&D frame. What is needed, in this context, is more opportunities for organizations to meaningfully document and share these practices, rather than simply "branding" people's work within a new frame:

> Those practices are there, it's just they're not uniform. And so, when [a private and influential foundation] drops in with "social R&D," there is this misconception about the extent to which this work is occurring, because it is occurring. … There are all sorts of practices that are out there, and so we need to shed this starting point that these practices don't exist. (Participant O)

Participant O's concern is that renaming the diverse forms of research and action organizations undertake under the umbrella of Social R&D enables a standardization of practices (e.g., best practices) that shift power from grassroots organizations to the funders and fiscal intermediary organizations that oversee and manage grassroots efforts. Implicitly, Participant O sees Social R&D as a policy trend (but not as a distinctive methodological framework) led by a small group of people who have "substantial access to wealth and to expertise" (Participant O). Indeed, these data suggest Social R&D is not widely used or uniformly understood by community organizations—although the concept is readily taken up in some networks (e.g., 94% of survey respondents indicated that using this frame). This suggests that Social R&D is not simply coercively imposed on organizations; rather, as it gains prominence, it has an increasingly normative effect on organizations across the social purpose sector in three main ways: it fails to acknowledge the innovative history of hard-won practices and knowledge that are grounded in lived experience and developed in grassroot organizations; it tends to delegitimize/replace grassroot practices by promoting new forms of professional expertise (e.g. start-up entrepreneurship, industrial design, market research, lean prototyping); and it tends to frame complex social and political problems as having simple technical solutions. For Participant O, this combination of effects undermines the critical analysis of neoliberal economic and governance shifts that underpin the problems SPOs seek to solve; consequently, Social R&D distracts from, rather than addresses, the root causes of social inequality.

DISCUSSION AND CONCLUSION

Across the four portraits, three main conceptualizations are especially worthy of discussion: Social R&D as an encompassing policy notion, Social R&D as a methodological framework based in a cyclical process, and Social R&D as a rebranding strategy that legitimizes problematic neoliberal logics. Each of these advance elements clarifying the value or purpose of Social R&D.

Portrait 2 and Portrait 3 both align directly with the literature that discusses Social R&D as a policy notion encompassing various ways of linking research and development (National Research Council, 1978; Rajasekaran, 2016). This first conceptualization represents 63 percent of survey respondents and 60 percent of interviewees. In Portrait 2, the value of Social R&D is its ability to legitimize both research-type and development-type activities, such as applied research, evaluation research, or human service implementation (see Table 1); skills; and infrastructure that funders in a nonprofit sector mainly structured for service delivery do not yet acknowledge. Portrait 3 also aligns with this conceptualization, even though participants do not use the Social R&D terminology. Portrait 3 is an example whereby the grey literature of the second wave seeks to build Social R&D as a legitimate policy notion applicable to practices even where people don't use this conceptualization. Here, the added value of Social R&D is questioned because, in contrast with Portrait 2, actors

aligned with Portrait 3 are already fully able to legitimately research and develop. But based on Portrait 1's emphasis on experimental prototyping, Social R&D as a methodology could strengthen the development activities of those who align with Portrait 3. It could, for example, better structure the prototyping stage of their programs. They could also look to multiple methods used by other Social R&D practitioners, such as service design (Zomerdijk & Voss, 2010).

The second main conceptualization (representing 33% of the survey respondents and 33% of interviewees)—Social R&D as a methodological framework (Ryan et al., 2018; Schulman, 2017b)—is only elaborated in Portrait 1. Here, the core value lies in the distinctiveness and originality of a process that directly links R&D steps through prototype elaboration. The data also revealed aspects that were not explicit in the literature; Social R&D is seen as a better alternative to most social innovation practices and processes, which are seen to be insufficiently grounded in large array of well-tested scientific and industrial methods and knowledge. Many elements in Portrait 2 (e.g., lack of conceptual distinction between invention and innovation, lack of anchorage in the scientific literature, etc.) could be seen as evidence justifying this critique.

The analysis of this study data and the second literature wave confirms that Social R&D is implicitly used to serve both policy and methodology purposes. Participants who align with Portrait 1 and Portrait 2 use the same term "Social R&D," but their respective conceptualizations clearly diverge and are often incompatible (e.g., industrial innovation is an inspiration in Portrait 1 and a destructive ideological element in Portrait 2). This is a major source of conceptual and practical confusion that hinders the scientific and policy utility of the concept. Since Social R&D as a policy notion encompasses a wide variety of approaches and methodologies—and Social R&D is only one methodological framework among many—the two conceptualizations should be expressed by different terms. As a policy notion, it could be named "research and innovation," while as a methodological framework it could remain "Social R&D." In any case, the policy efficacy (i.e., funding, measuring, skills building, infrastructure building, etc.) of Social R&D for the SPO sector will necessitate an explicit distinction between those two conceptualizations.

The third conceptualization, Social R&D as a rebranding strategy is mainly voiced in Portrait 4, but participants in Portrait 2 also expressed their instrumental use of the notion for grant-writing purposes and their skepticism about the notions (e.g., industrial innovation) that define Social R&D. This conceptualization is absent from the grey literature of the second wave, although it is directly echoed in the literature on social innovation. Much research has shown how contradictory forces are at play (Fougère & Meriläinen, 2019; Joy et al., 2019): some actors use social innovation to gain support for social welfare, while others seek (intentionally or unintentionally) the transformation of welfare practices according to neoliberal values and agendas (Marques et al., 2018). This data shows a strikingly similar tension: Portrait 1 values entrepreneurship and market-based solutions without nuancing the potential destructive effects of such strategies, while in Portrait 2, Social R&D legitimizes the allocation of additional resources for the creation of more equitable professional and institutional practices. This conceptualization of Social R&D as a problematic rebranding strategy is very similar to "instrumental social innovation," defined as the "rebrand [ing] of existing activities and initiatives in line with the latest nomenclature, without fundamentally (or indeed superficially) altering their goals or outputs" (Marques et al., 2018, p. 503).

As such, this exploratory study suggests that future research should focus on two main aspects. First, detailed case studies should be added to the literature to further compare Social R&D (as a methodological framework) with similar approaches (e.g., action research, social innovation laboratories, developmental evaluation, human-centred design, etc.). This is necessary to identify more precisely the contribution *and limitations* of Social R&D in the context of SPOs. This could directly address questions such as those raised in Portrait 3. Second, following the strand of skepticism and critique found in the study data and noticing the easily transposable resources in the social innovation literature, further critical examination of the narratives and practices associated with Social R&D is a priority to clarify the kind of "social" transformation such practices are, in fact, serving.

NOTE

1. This article uses the notion of Social purpose organization as defined by Employment and Social Development Canada:

   The entire spectrum of organizations with a mission to advance social or environmental aims. Social purpose organizations straddle the charitable and non-profit sector (including registered charities, incorporated non-profit organizations and non-profit co-operatives), the private sector (including market sector co-operatives and private businesses advancing a social or environmental mission). (ESDC, 2019, p.16)

   Like, social innovation, Social R&D is a trans-sectoral trend that includes public sector, academic and social economy actors. Nevertheless, most organizations that participated in this research belong to the nonprofit sector.

2. Respondents cover the following social issues and fields: SPO ecosystem and capacity building ($n = 10$), poverty ($n = 9$), homelessness and housing ($n = 6$), disabilities ($n = 5$), physical and mental health ($n = 3$), injury prevention ($n = 2$), education ($n = 4$), employment ($n = 2$), community sport and arts ($n = 2$), immigration ($n = 2$), youth and family services ($n = 2$), international development ($n = 1$), racism ($n = 1$).

WEBSITE

Social Innovation Canada, https://sicanada.org/

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