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2018

### Innovations from the Margins: Creating Inclusive and Equitable Academic-Community Research Collaborations

Michael J. McNamara

*Sheridan College*, michael.mcnamara@sheridancollege.ca

Sara Cumming

*Sheridan College*, sara.cumming@sheridancollege.ca

Jessica Pulis

*Sheridan College*, Jessica.pulis@sheridancollege.ca

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McNamara, Michael J.; Cumming, Sara; and Pulis, Jessica, "Innovations from the Margins: Creating Inclusive and Equitable Academic-Community Research Collaborations" (2018). *Publications and Scholarship*. 35.

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## Negotiating Bottom-Up Participation in the Complex Game of Philanthropy: Insights from the Community Ideas Factory

Michael J. McNamara, Sara J. Cumming, & Jessica Pulis  
Sheridan College

### ABSTRACT

How does one build a Request for Proposals (RFP) process that allows for bottom-up participation while simultaneously being pragmatic and adept enough to manoeuvre the complexities of a multi-stakeholder environment defined by differing interests, objectives, mandates, and power dynamics? This article showcases the findings from participatory work with stakeholder groups working in the area of food security in Southern Ontario's Halton Region. It demonstrates a process designed with the specific intent of increasing the engagement of beneficiaries and service providers in the RFP process. Finally, the article seeks to shed additional light on theory and practice of "participatory approaches" in the context of philanthropy. It is important to be realistic in not reifying participation itself in this context. In both theory and practice, this means adopting lenses and models that openly consider the complex realities, political obstacles, and trade-offs that occur when negotiating participation in this environment.

### RÉSUMÉ

Cet article aborde la question suivante: comment créer un processus de demande de propositions (DP) permettant une participation ascendante tout en étant suffisamment pragmatique et suffisamment habile pour gérer les complexités d'un environnement multipartite défini par des intérêts, objectifs, mandats et dynamiques de pouvoir différents? La question est répondue en présentant les résultats d'un projet de travail participatif intégrant des intervenants travaillant dans le domaine de la sécurité alimentaire dans la région de Halton, dans le sud de l'Ontario. L'article illustre un processus conçu qui a le but spécifique d'accroître la participation des bénéficiaires et des fournisseurs de services au processus de demande de propositions. Enfin, l'article cherche à apporter une réflexion additionnelle sur la théorie et la pratique des « approches participatives » dans le contexte de la philanthropie. Il met de l'avant l'importance d'être réaliste dans ses attentes pour ne pas réifier les bienfaits de la participation dans ce contexte. En théorie et en pratique, cela signifie d'adopter des objectifs et des modèles qui tiennent compte ouvertement des réalités complexes, des obstacles politiques et des compromis qui se produisent lors de la négociation de la participation un tel environnement.

**KEYWORDS / MOTS CLÉS** Participatory development; Creative problem-solving; Philanthropy; Food security  
Développement participatif; Résolution créative de problèmes; Philanthropie; La sécurité alimentaire

## INTRODUCTION

Established in 1994, the Oakville Community Foundation (OCF) plays an influential role in the Town of Oakville by linking philanthropic families and organizations with the needs of the local community. Managing the contributions of Oakville's philanthropic donors, the OCF seeks to ensure that funds are utilized in a way that ensures they can have an impact on the local community year after year. Here, one of its key activities is the provision of grant funding to community projects in the Halton Region. In 2016, the OCF approached researchers at Sheridan College for assistance in improving the efficiency and effectiveness of its granting and disbursement processes. Both parties agreed that gains could be made if a more bottom-up, participatory process was adopted—a process in which ideas for projects were developed and informed by funding beneficiaries (users) and charitable agencies (service providers) as opposed to the traditional practice wherein individual charities developed their own proposals *in response to* Requests for Proposals (RFPs) created, selected, and issued by the OCF and its funder holders (donors). The ensuing collaboration and partnership became known as “The Community Ideas Factory” and is the subject of this article.

How does one actually build an RFP process that allows for bottom-up participation while simultaneously being pragmatic and adept enough to account for the interests of disparate stakeholders and the accompanying political realities that are a part of the Halton Region's philanthropic network? This is no easy task and, unfortunately, answers to that question are not immediately clear. The literature on participatory development has shed a great deal of light on the practice and techniques of bottom-up participation in program decision-making. But it has yet to adequately resolve the challenge of genuine downward accountability in a complex, multilayer decision-making environment (how and if practitioners and donors will genuinely cede power to locals) (Bryant, 2015; Chambers, 1994, 1997; Jacobs & Wilford, 2010; Wenar, 2006). The general consensus seems to be that downward accountability, even if it were achievable, would not be an easy, linear, naturally occurring, or non-complicating process (Hira & Parfitt, 2004; Williams, 2004). Moreover, the vast majority of the understandings of “how to do” bottom-up development comes from studies centred squarely on the “development project” or “program aid.” While important, these studies offer little in the way of concrete instruction for how to “do participation” in an open-ended, multilayered process such as grant funding.

This article demonstrates the unfolding of the new, participatory RFP process created through the Community Ideas Factory (CIF) initiative. In this new process, users (intended beneficiaries) and service providers (community agencies) utilize participatory tools to develop solutions and recommendations that inform the scope and content of the new RFP. Donors retain control over which recommendations go forward into the RFP (and, ultimately, which of the ensuing submissions will be funded), but their choices are constrained to the range of recommendations brought forwarded by users and service providers. Critics will rightly point out that this process puts us only halfway up the ladder of local participation (Arnstein, 1969) and fails to fully achieve the “empowering intentions” of participatory development, or what Chambers calls the fifth power or the power to empower (see: Green, 2012). Pragmatists will recognize that the new process represents a significant improvement from the traditional way of doing things and serves as a clever compromise between the donors' demand for a dominant role in decision-making and the beneficiaries' right to have control over the process. Moreover, by bringing the voices of users and service providers into the process for the first time, the project has unlocked a whole new series of information, conversations, and relationships that are helping to erode and break down the culture of top-down decision-making that has historically defined philanthropic decision-making in this area. Taken as whole, this article argues that, when it comes to philanthropy, participants are not free to do whatever they want. They are beholden to organizational mandates, the traditional structures of the system, the expectations of donors, and working within the scope of available resources. And yet even here, it is possible to achieve incremental improvements, the long-term benefits of which may not be immediately evident.

The article begins with a theoretical discussion of “participatory development” as it is relevant to our experience. Next, it offers a brief description of the CIF initiative, giving specific attention to its rationale, structure, and vision. Here, it also explains how our work on food security figures into the broader structure of the CIF. Next, it discusses the stages of the new RFP process to show how the findings, ideas, and solutions generated by the intended users and service providers are used to inform and structure donor decision-making. The final section of the article considers the implications of our experience for a more general theory of “participation” in the context of philanthropy. Specifically, our experience shows the need to be realistic in not reifying participation itself. Theoretically, this means adopting a lens that openly considers the complex realities and political obstacles to genuine participation that exist within the game of philanthropy. It also means considering and accounting for the incremental, cumulative, and long-term benefits that may accrue from adopting even limited forms of bottom-up participation where none existed before.

## **PARTICIPATORY DEVELOPMENT AND ITS CHALLENGES: A POLITICAL ECONOMY VIEW OF PARTICIPATION**

Participation has been a dominant theme in the discourse on development for several decades. As one might expect, a variety of different definitions and schools of “participation” have emerged over this time (Oakley, Birtei-Doku, Therlrildsen, Sanders, Harland, Herrera Garibay, & UNIFEM, 1991). These range from those that emphasize the instrumental value of including key sources of information into the project decision-making apparatus (as exemplified in the work of Cohen & Uphoff, 1977) to those that emphasize the social value of empowering people to control their own lives, communities, and futures (explored in the work of Chambers, 1992, 1994, 1997). While most definitions and schools of participation share the view that development will be enhanced if people are actively involved in the processes that affect them, they seem to vary wildly in the extent to which they a) advocate for the involvement and engagement of intended beneficiaries across the stages of developmental decision-making; and b) the value they place on doing so in the first place (as a means to an end, or as an end in itself) (Hira & Parfitt, 2004).

Accompanying this advocacy of participation, in whatever form it may take, has been the rise of a veritable cottage industry of “participatory methodologies.” These methodologies include, but are not limited to, “participatory research” (Green, George, Daniel, Frankish, Herbert, Bowie, & O’Neill, 1995), “participatory action research” (McIntyre, 2008), “action research” (Stringer, 2007), and “community-based participatory research” (Israel, Eng, Schulz, & Parker, 2013; Israel, Schulz, Parker, & Becker, 1998). In the context of project planning throughout the developing world, and now throughout the developed world, the most influential of methodologies has been Participatory Rural Appraisal (PRA). This methodology owes a great deal to the work of Robert Chambers (1992, 1994, 1997) who characterizes it as “a growing family of approaches and methods to enable local people to share, enhance and analyze their knowledge of life and conditions, and to plan, act, monitor and evaluate” (Chambers, 1992, p. 1).

In addition to offering a number of techniques for how to include beneficiaries in decision-making throughout the stages of the project life cycle, PRA emphasizes a number of principles and features. These include the importance of establishing trust with and between stakeholders (Chambers, 1997), the need for providing clearly demarcated and accessible feedback channels (Chambers, 1992, 1997), and the need for highly trained facilitators who will play a role in changing attitudes and counteracting the biases of top-down development (Chambers, 1994, 1997). Moreover, numerous scholars have exemplified the application of PAR tools and the accompanying principles in facilitating the process of self-discovery described by Chambers (see, for example, Sethi and Belliard’s 2009 study of participatory health assessments in Haiti). In merging the *concepts* and *processes* of activist participatory research with the *PAR tools* of participatory development practitioners, Stephen Sethi and Juan Carlos Belliard (2009) further demonstrate the important role of a trained research-practitioner to act as convenor, catalyst, facilitator, and advocate of the assessments, prioritizations, and solutions developed by communities themselves.

Despite its growing popularity, PRA has also received significant criticism. For example, Glyn Williams (2004) suggests that Chambers' expectation that development practitioners and agencies will actually cede their power to local communities is naïve. Moreover, he goes on to suggest that Chambers' explanation of the process through which this might actually occur is only vaguely understood and appreciated. This critique raises several concerns, some of which Chambers shares. Perhaps the greatest concern here is that PRA (and participatory methods more generally) will be embraced only in a tokenistic and perfunctory manner. Here, Robert Leurs (1998) observes that the biggest challenge facing PRA continues to be the hierarchical organizational culture that continues to pervade non-governmental as well as government organizations, regardless of their stated commitments to bottom-up decision-making. Anil Hira and Trevor Parfitt (2004) further observe the common pattern wherein development agencies seem to adopt PRA in name only so that they can claim to be participatory, only to try and institutionalize it as a part of their existing top-down procedures.

These criticisms pave the way for a more nuanced, politicized view of participation, one that openly considers the political obstacles to genuine participation that exist in a project context. Here, Hira and Parfitt (2004) are instructive in suggesting that any attempt at theorizing or practicing participatory development must confront questions about the political economy of participation; namely, who allocates resources, how, and why? As they suggest, in the context of development planning, "there are a mix of actors with power, including the funding agency, the donor agency, and the host government. The need for demonstrable results in line with the values of the funding agency constrains the donor agency and sets up the sick environment of development" (p. 158). Others, such as Judith Tandler (1997), have effectively shown how in reallocating resources and power capabilities, development interventions tend to create both *winner*s (individuals incentivized to support the project) and *loser*s (individuals incentivized to oppose the project). As Tandler's study of Ceara in Brazil powerfully demonstrates, the success of community development projects seems to *require* that these incentive structures be adequately addressed, planned for, and, where needed, counteracted. Others, such as Tania Murray Li (2002), have shown how local histories and cultural understanding shape local stakeholders' responses to new opportunities for participation. Still others point to the extremely limited leverage, resources, and capacities of impoverished, loosely organized local stakeholder groups to resist the channelled development interventions of highly structured agencies—in whatever form they may take (Logan & Moseley, 2002; Ramachandran & Walz, 2012).

Adopting a more nuanced, politicized view of participation is particularly instructive for understanding our own response to the challenge of building a new, participatory RFP process for philanthropy in Halton. As academics, we are typically afforded the greatest degrees of freedom in our advocacy for, and recommendations about, bottom-up, participatory initiatives. Yet, as a collaborative research project, it is important to recognize that our community partner is far more constrained. Thus, a more nuanced and politicized theoretical lens is better suited to recognizing these constraints, which, in our case, meant that we could not simply turn over all decision-making authority and control for the RFP process to the intended beneficiaries. This was the case for a number of different reasons. First, as an RFP process, our deliverable was a successfully funded project, *which someone else would be applying and agreeing to do*. As such, the involvement of those participants would be key to the process. As is the case with the vast majority of OCF grants, it was expected that the applicants (and, ultimately, the executor) of the grant funding would be one of the many charitable agencies in operation in Halton; and as such, their involvement in the new RFP process was seen to be a priority.

Second, consider that the OCF exists at the leisure of its fund holders and corporate donors. If its fund holders or corporate donors deem the foundation to be under-performing, they may simply withdraw their funds and the foundation will be, essentially, no more. Thus, maintaining effectiveness, efficiency, and a positive relationship with fund holders and corporate donors is paramount for the OCF's survival. It is worthwhile to note that fund holders have been very active participants in the philanthropic process. Quite understandably, many of them expect to continue to have some voice in deciding how, and to what ends, their contributions are being used. For these reasons, it was felt that the new RFP process had to

include a mechanism for continued fund holder involvement in decision-making, such that they could be assured that their contributions were being used in a way that aligned with their values and delivered results that they believe are worthwhile.

In short, the emerging body of literature that seeks to define the parameters of a more nuanced, politicized understanding of the dynamic processes and outcomes of the participatory process is particularly instructive in explaining our own experience in this project. This understanding helps us move away from a more abstract understanding of participation by calling attention to how “participation” works within local contexts, prerogatives, power and incentive structures, as well as organizational mandates. In doing so, our own experience, discussed below, seems to reaffirm Chambers’ (1994) observation that participatory development is indeed a messy, dynamic, and non-linear process in which practitioners must be creative and flexible in their approaches by experimenting and innovating as they go along, with the dictum: “use your own best judgement at all times” (p. 116).

## **BACKGROUND AND OVERVIEW OF THE COMMUNITY IDEAS FACTORY**

The OCF is one of the largest community foundations (CFs) in Canada. As a CF, it is tasked with managing and disbursing donor contributions for philanthropic projects in the Town of Oakville. In the spring of 2015, the OCF approached a team of researchers from Sheridan College to help develop and facilitate a series of creative problem-solving (CPS) workshops that would engage community stakeholders in a “Community Conversations” event, a discussion of the key issues to be addressed and included in the OCF’s 2015 *Vital Signs* report (Oakville Community Foundation, 2015). In this effort, Sheridan College hosted several CPS workshops for over 20 community agencies in the summer of 2015. The results of these sessions were included in the OCF’s 2015 *Vital Signs* report and, specifically, were used to identify the most significant issues affecting quality of life in the Oakville community. Among the key target areas identified for action in the report were access to affordable housing, food security, employment equity, and wrap-around support services.

Success in this initial collaboration sparked new conversations between the Sheridan team and the OCF about how to advance progress on those issues. Both parties agreed that advances could be made by improving the efficiency and effectiveness of the application and disbursement process for allocating funds in the Halton Region. Specifically, it was agreed that gains could be made with the adoption of a more broad-based, participatory, and collectivist approach to the funding process. Here, the move toward “participation” was initially embraced for its instrumental value, including a) better alignment of strategic funding priorities of the RFPs with the needs and priorities identified by front-line clients and service providers; b) a reduction in proposal duplication and inter-agency competition in funding competitions; and c) improved inter-agency coordination, collaboration, and resource-sharing in proposal development and new-program planning. Beyond its instrumental value, the team also recognized the capacity of “participatory approaches” to increase the independence, awareness, and capacity of marginalized populations accessing the services.

These conversations materialized in the concept of the “Community Ideas Factory,” an initiative that would leverage Sheridan’s research and creativity expertise, its creative spaces, and its creativity resources in supporting the OCF’s efforts to implement a participatory decision-making approach with a view toward the creation of new, fundable projects that align with and advance work on key vital signs issues. And so, while we have often championed CPS as a means for unlocking novel solutions, in this project, we tended to embrace CPS as a means for incorporating the knowledge and opinions of marginalized people in the planning of initiatives that affect them (for a further conversation of how CPS fits within participatory frameworks, see World Food Programme, 2001). In March 2016, the project received funding from the Social Sciences and Humanities Research Council (SSHRC). Over the course of the project’s two-year life cycle, it was agreed that participatory approaches would be utilized in order to build new “program concepts” that would

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address key vital signs issue areas, namely and in order: affordable housing, food security, employment equity, and wrap-around programming. This article focuses exclusively on the findings from our work on food security. Findings from our work on the other three vital signs issue areas are discussed elsewhere (see Cumming & McNamara, 2017; Cumming, Pulis, & McNamara, 2018; McNamara & Cumming, 2018).

The new RFP process built by the project team reflects a need for the involvement and participation of different stakeholder groups at varying stages in the process. In stage one, Discovery, the researchers wrote extensive literature reviews. These reviews encompassed current academic findings, studies from the government, and research released by not-for-profits, as well as providing discussion of best-practices, nationally as well as internationally. Additionally, participatory mapping exercises were conducted with local users of community services in order to identify the challenges, opportunities, and potential in the given sector. In stage two, Problem-Solving, front-line service workers were invited to participate in a series of CPS workshops in order to develop and refine many of the ideas generated through the Discovery stage. In stage three, the Think-In, the researchers presented and discussed the findings from Discovery and Problem-Solving stages with the fund holders. In stage four, the BeCause RFP, fund holders voted on the recommendations brought forward during the Think-In, and the OCF developed and issued a new RFP. In stage five, the Philanthropitch, applicants to the RFP were invited to pitch and discuss their submissions with the fund holders and project team. Thereafter, through a process of online voting by the fund holders, funding awards were made.

Embraced, branded, and presented to stakeholders on the merits of its instrumental value, this new RFP process in no way approximates the degree of beneficiary ownership over all levels of project decision-making as advocated by Chambers (1997). However, it does account for the unique political realities that define our environment. Moreover, it represents a significant improvement on the previous system, which featured little to no input from the front lines. Below, the article outlines how we used this process to generate a new RFP and, ultimately, a successfully funded project to support food security in Halton Region.

### THE NEW RFP PROCESS IN ACTION: FOOD SECURITY

In January 2017, the Community Ideas Factory began its work on the OCF's vital signs issue of addressing, supporting, and improving access to food security.

#### Stage one: Discovery

Following an extensive review of the literature on food security in Canada, the research team conducted a series of participatory data collection activities with people who access food services in the region. The overarching purpose of these activities was exploratory and descriptive: to draw on a combination of formal research and direct empirical realities to garner a deeper understanding of the nature of the problem (in terms of related service barriers and gaps) and to generate a collaborative list of ideal programming characteristics to be considered by funders, policymakers, and programmers. Data collection was conducted with food bank users (neighbours) held at the Oakville Neighbourhood Centre on February 22, 2017. The number of neighbours participating in activities fluctuated between 35 to 48 participants. Some participants came for lunch but left before the activities were fully underway; others came part way through the activities, after stopping at their normal food program or once their children were in programs for the afternoon. In total, data was collected from 36 neighbours.

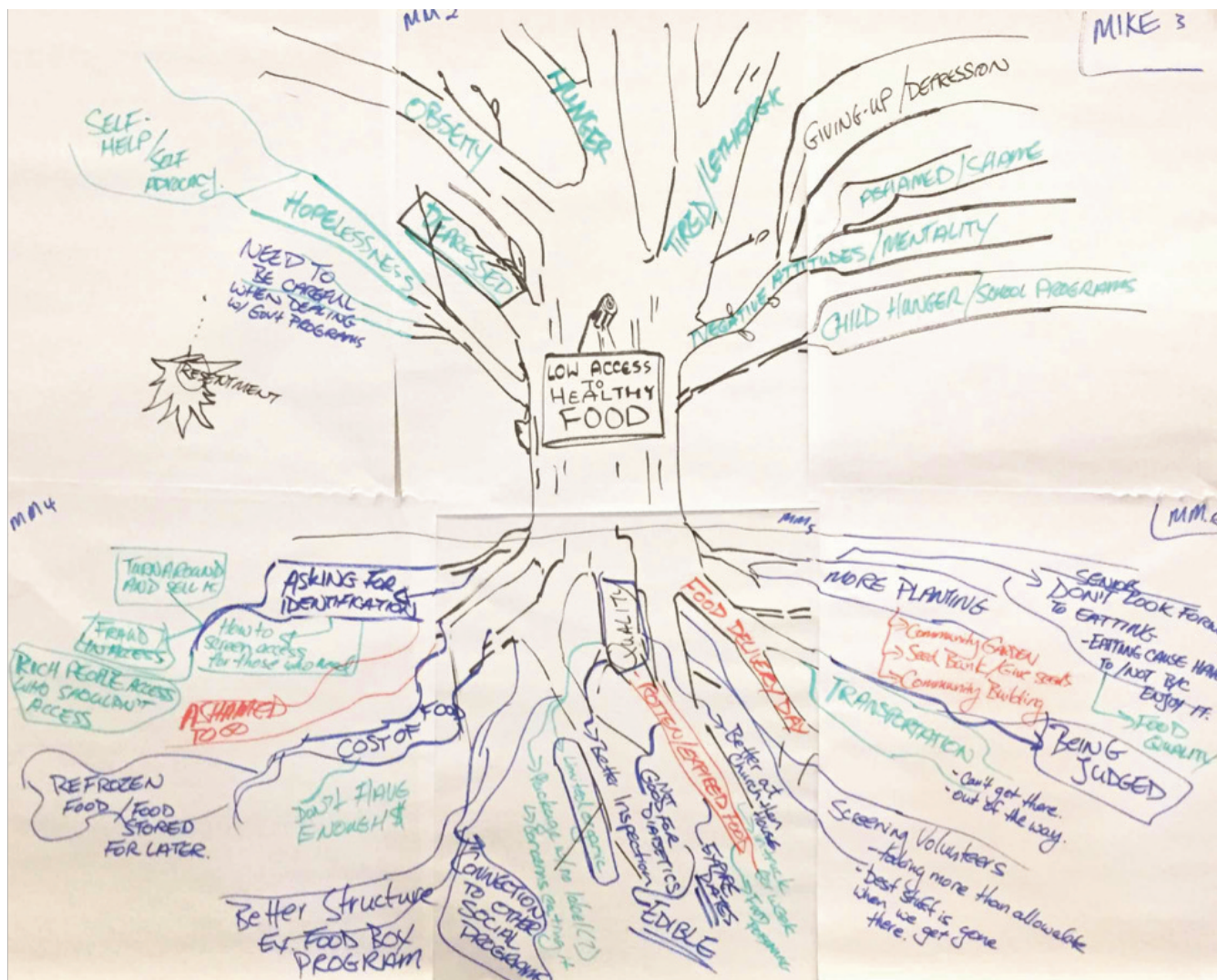
#### *PRA techniques: Cause-effect mapping*

Cause-effect mapping is central to many forms of project planning among development agencies. A PRA tool for cause-effect mapping, known as "problem-tree mapping" (World Food Programme, 2001), was used to help the group find solutions by mapping out the anatomy of cause and effect around the issue of "low access to quality food." This methodology

allowed us to break down the problem of food access into definable themes and to better understand the interconnected and even contradictory causes of participants' challenges in accessing quality food. In this exercise, the problem of "low access to quality food" was written in the centre of the flip chart and, as the focal problem, became the "trunk" of the tree. Next, the group identified the causes of the focal problem (the roots). Also, the group identified the consequences, which become the branches. These causes and consequences were created by the group through the discussion. Of greatest interest in this exercise was the discussion, debate, and dialogue that was generated by participants as they arranged factors and formed subdividing roots and branches, all of which helped us better define the nature of the problems neighbours confront in accessing quality food.

Problem-tree mapping facilitated nuanced discussions and accompanying visual depictions (see Figure 1) that helped neighbours, artists, and facilitators define and articulate the nature of the problem vis-à-vis its interconnected and even contradictory causes and consequences. Together, these discussions pointed to four main barriers to accessing healthy food in Halton and five main consequences of these barriers. These identified sets of factors correspond with findings from the literature review.

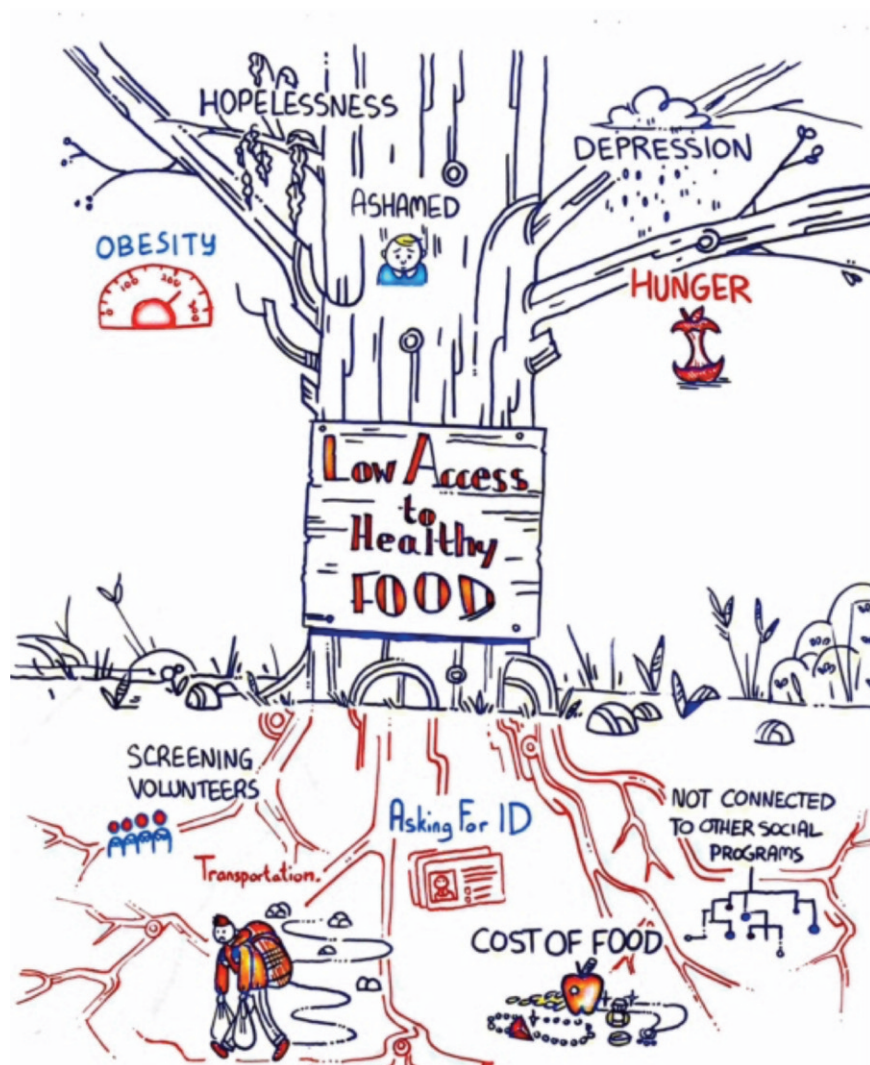
Figure 1: Problem-Tree Group One





The four main causes of low access to healthy food identified by neighbours were: 1) the lack of financial means (see Figure 2); 2) challenges and obstacles navigating access to food services; 3) the lack of quality, quantity, and variety of foods available at food banks; and 4) experiences of stigmatization when accessing food services. The first of these—an inability to afford required foods because of income levels—was the most often-cited barrier to food security. Other noted access-related barriers included not knowing the location of local food banks, not having transportation to get to food banks or other food services, and not being able (or wanting) to access food banks when proof of food insecurity is required and/or discrimination and stigmatization for needing to access them is experienced. At the same time as many participants expressed gratitude that food programs exist in Halton (and more broadly), they also had notable concerns about both the quantity, quality, and variety of foods offered, as well as the humiliation they felt because of their need to access these services to provide basic nutrition for their families. In the former case, neighbours' most common concern was in relation to a general absence in local food banks of healthy foods that also meet varying health and cultural needs (e.g., diabetes, gluten allergies, veganism, halal requirements) and/or that are “kid friendly” (i.e., neighbours with young children asserted a desperate need for baby formula and baby food). In relation to feeling stigmatized, neighbours noted that not only did they feel general shame for having to rely on food banks, they also felt incredibly judged by other food bank users and volunteer staff when accessing these and related services (see Figure 2).

Figure 2: Problem-Tree Group Two



Of course, barriers to accessing healthy food in Halton have real consequences. Six such themes emerged: low physical health; low mental health; low emotional health; financial crisis; feelings of isolation; and generational issues. The former three of these themes are interrelated and somewhat difficult to pull apart. Nevertheless, from neighbours' experiential knowledges, the research team identified separate aspects of these components of overall health and well-being. For example, most neighbours noted a deterioration in their physical health (e.g., strength) due to being chronically hungry and/or skipping meals to ensure that their children ate. Participants also related numerous negative effects being chronically hungry and/or concerned about potential hunger had on mental aspects of their health: feelings of hopelessness, depression, lethargy, stress, and anxiety, for example. Given these experiences, it is not surprising that many participants also noted significant deteriorations in their emotional well-being. Within this thematic grouping, senior neighbours articulated that they never imagined that after working and paying taxes for most of their lives they would end up in a situation where they needed to rely "on handouts," and those with children said they felt great shame and embarrassment for their perceived personal inability to provide adequate nutrition for their families.

The latter three consequences of neighbours' low access to healthy food also are interrelated. For example, some participants spoke about financial consequences, such as being so hungry that they felt they had to make the decision to forgo paying bills (e.g., hydro and/or rent) so that they could purchase food instead, while other people suggested that their hunger-related inability to concentrate resulted in them losing their employment. Building on this theme, some participants stated that a continual inability to provide food for their children resulted in them moving in with and/or relying on family members for food and money. In some cases, this necessity resulted in family breakdowns and thus isolation—an issue that is exacerbated by a general inability to socialize outside of the home due to a lack of necessary finances. Finally, participants who had children expressed not only shame and embarrassment about their inability to independently provide adequate nutrition for their families but also fear about reproducing poverty and related stigmatization in their children's lives. They articulated this by reasoning that children who lack nutritious food are unable to concentrate at school and that even those children who are lucky enough to attend a school with a child-hunger program are stigmatized for accessing such services. The participants noted that their children often exhibited behavioural problems at school, which they felt certain was directly related to their lack of nutrition and subsistence.

The findings from the problem-tree mapping exercises corroborated much of what was found in the literature on food security in Canada. For example, a Toronto-based report on food bank usage conducted by Rachel Loopstra and Valerie Tarasuk (2012) found that almost all families that accessed food banks communicated concern about being able to meet their food needs or not being able to do so.<sup>1</sup> For instance, 22 percent of families felt that their food needs were unmatched with what was provided at food banks in terms of nutrition (e.g., a lack of availability of fresh fruits and vegetables) and/or necessary dietary and/or cultural restrictions (e.g., halal). Specifically, these families described receiving rotten produce, "junk food," foods past their best before dates, and/or only canned foods. Moreover, many people expressed the feeling that this generally poor quality of foods made accessing food banks not worthwhile.

A meta-analysis of research on food bank systems across different countries, including Canada, by Chantelle Bazerghi, Fiona McKay, and Matthew Dunn (2016) supports these findings. This research corroborates our own findings in pointing out that people who access food banks want a greater range of foods, particularly more fruits and vegetables, dairy, and meats. At the same time as these researchers highlight a desire among recent immigrants who access food banks for more culturally appropriate foods, they also point to a more general desire among people who access food banks for greater consistency across food items and quantities, especially for staple items and age- and health-related "special-needs food" (e.g., nutrient-rich foods to support children's cognitive development and ability to learn).

*PRA technique: Mind mapping*

Following the cause-effect mapping exercise, group facilitators and illustrators captured participants' informed contributions, this time as a mind map: a graphic technique particularly appropriate for working with groups to generate ideas around a single concept or theme, which in this case was ideas for making your food program better (see Figure 3).

Figure 3: Mind map



Artists wrote this phrase and wrapped it in an image in the centre of another blank flip-chart page. Next, the teams worked to brainstorm associated representations (e.g., images, phrases, words), which were added and layered around the central phrase. To sustain the group discussions until thematic saturation, facilitators asked probing questions such as: “what kinds of food,” “where would it be located,” and “how do you access the program?” while artists connected major ideas directly to the central concept and branched the others out from those.

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The six thematic areas that emerged from this mind-mapping activity about ideal food programming in Halton are very reminiscent of those outlined by Janine De la Salle and Jamie Unwin (2016). The first centres around the intake process. Despite some noted concerns that some people access food banks when they do not need them, neighbours maintained that, in an ideal food program, people would automatically be given access to food services and programs without any burden of proof of poverty. Second, every participant imagined food programs that include community-based cooking and nutritional classes. In relation to this programming theme, some groups underlined the importance of instituting community gardens, where neighbours can actively participate in growing their own food. In addition, neighbours suggested collective canning events and batch cooking, where they could swap meals with others. Other groups suggested the possibility of offering weekly community dinners to not only provide food but also to help alleviate some of the social isolation many neighbours experience. Perhaps one of the most unexpected programming ideas—and yet one also brought forward by every group of participants—was to introduce a policy that requires individuals who work in the food security sector (either for pay or as volunteers) to go through mandatory preparatory sensitivity training to help decrease the shame and stigmatization neighbours experience.

Building on this point, participants, overall, recognized that food programs centralized to more accessible locations (for example, on the main floor of a community housing complex) are ideal because food is delivered directly or in close proximity to where neighbours themselves reside. This prevents the difficulties some residents experience having to make their way to and from and in search of food service programs. The most common suggestion to emerge was a theme related to the transportation of food delivery services, especially for elderly neighbours, lone parents with young children, and/or people with any type of disability.

Given the tendency for people to express concern about the quality and types of food available in food banks (Bazerghi, McKay, & Dunn, 2016; Loopstra & Tarasuk, 2012), it is not surprising that neighbours' ideal food programs would have fewer foods that are low in nutrients and high in sugars and starches. They also would have better strategies for ensuring well-labelled foods and foods that meet a wider array of cultural and dietary needs and restrictions. Also, on a related but somewhat divergent point, neighbours' ideal food programs would be advertised using a wider array of communication strategies (e.g., not only posters throughout the region but also weekly email updates, phone calls, and door-to-door advertising) so that even people without phone and/or internet amenities could learn about the services.

Within this same communication strategy theme, participants suggested that social assistance offices, employment support offices, subsidized and cooperative housing units, and apartment buildings and houses in known low-income areas make widely available pamphlets that list food programs and services offered in the region (including hours of operation and intake requirement details). Also, they noted that it would be ideal if program administrators and boards of directors worked to build communication bridges between executives and neighbours both to help reduce the latter's experiences of being stigmatized and, thus, to make accessing local food services a more pleasant experience. Clearly, these points mirror research findings that the people most likely to access food programs also often require the support of other governmental and/or charitable services. As a result, neighbours reasoned that an ideal food program would be offered in a central location, in a building that shared—and connected—food services and programs with other essential wrap-around programs and services.

### Stage 2: Problem-Solving

In April 2018, the Community Ideas Factory hosted a six-hour CPS workshop on food security at Sheridan College. In total, 37 people representing 27 organizations (not-for-profits, public, and private) participated in the CPS workshop. Participants were seated at six different tables, with each group assigned its own CPS facilitator from Sheridan College.

Figure 4: Idea menu

# Creative Ideas Factory Feature Items

For April 4<sup>th</sup>, 2017

Today's fare features some of the finest social innovations in food programming from across North America, complimented by an assortment of uniquely local contributions. Your facilitator will be more than happy to help you and your group with your selection.

## Food Distribution to Members & Partner Agencies

- **How might we improve social innovation by combining food distribution with food skills?** Observed innovation in this area includes recipe cards, food demos and tastings, labelling repackaged food with specific ingredients
  - **In what ways might we create a more innovative, low barrier intake systems?**
- **How might improve social innovation by utilizing non-traditional distribution points?** Identifying where the people in need are and what types of foods would be beneficial to distribute from that location. Ex., Feeding America is increasing food distribution at hospitals, clinics, schools, and colleges

## Data Collection & Metrics

- **In what ways might we develop more innovative information sharing mechanisms?** For example, innovations in performance benchmarking dashboards have helped food banks to identify, connect, and learn from other food banks in the network.

## Partnerships

- **In what ways might we improve social innovation by linking to other social service providers?** Food banks are connecting food bank members with other services such as dental, legal, pensions, newcomer programs, accounting, haircuts, and employment opportunities.

## Programming & Member Engagement

- **In what ways might we improve social innovation by linking programs to employment and economic development?** Examples of innovation in this area include linking food distribution with employment skills/opportunities and supporting food security through local economic development programs
- **How might we improve social innovation by increasing food literacy and food skills for all?** Examples of innovations in this space include food skill courses; including how to preserve food, prepare healthy affordable meals, or read food labels.
- **How might we improve social innovation by integrating community gardens?** Community garden spaces are providing opportunities for multiple programs and are being used by food banks in providing food literacy, food production skills, farmer training programs, gathering and community spaces, and fresh produce for programs.

## Community & Donor, Education & Engagement

- **How might we improve innovation in community/donor education and engagement?** Tours and volunteer events can be used to explain root causes of food insecurity, why 'traditional' food banking is not working, and how new strategies can support the reduction of need for emergency food services.

## Food Purchasing

- **How might we improve social innovation by building relationships with local farmers and farm associations?** Many food banks are creating new direct purchasing relationships with local producers to increase the quality of food being distributed.
- **How might we improve social innovation by growing food for programs?** The Saskatoon Food Bank produced 20,000 pounds of food for distribution. These gardens can have many educational programs in addition to production for distribution.

## Communications

- **How might improve social innovation by leveraging social media to communicate to and engage with our members/neighbours?**

## McNamara, Cumming, & Pulis (2018)

CPS is an overarching approach to developing interventions that includes at least 172 techniques and instructional creativity enhancement methods used to develop people's creative thinking skills and creative achievement (Smith, 1998). Over the years, general consensus has emerged within the field that the Osborn-Parnes CPS program yields high and consistent returns in terms of outcomes judged to be novel and useful (Rose & Lin, 1984; Scott, Leritz, & Mumford, 2004; Torrance, 1972). The hallmark of this program, which was developed in 1953, is the dynamic balance of divergent thinking (i.e., a broad search for many diverse and novel alternatives) and convergent thinking (i.e., a focused and affirmative evaluation of novel alternatives), which are both applied across seven discrete phases of a problem-solving process: orientation, preparation, analysis, hypothesis, incubation, synthesis, and verification.

Over the years, through research and further application, the Osborn-Parnes model has evolved significantly. For example, the Thinking Skills Model developed by Gerard Puccio, Marie Mance, and Mary Murdock (2007) at the International Center for Studies in Creativity at SUNY Buffalo State University revises the Osborne-Parnes model to include three conceptual stages, six explicit process steps (each with a repetition of divergence and convergence), and one executive step at the heart of the mode (see also, Puccio, Mance, Barbero Switalski, & Reali, 2012).

In the current context, a modified CPS approach based on the Thinking Skills Model was used to guide stakeholders through a thinking process characterized by problem selection and definition (developing an enhanced understanding of complex problems); idea generation (generating ideas through a structured, participatory approach); solution generation (comparing, evaluating, and developing solutions using an affirmative and inclusive approach); and implementation plan-

**Figure 5: Selected and revised challenge statements from the groups**

### Selected/Revised Challenge Statements

- Group 1: In what ways might we create a more innovative, low barrier intake system?
- Group 2: How might we improve social innovation by increasing food literacy and food skills for all?
- Group 3: In what ways might we improve social innovation by linking programs to other services?
- Group 4: In what ways might we improve social innovation by linking programs to employment and economic development?
- Group 5: In what ways might we improve social innovation by linking to other social services?
- Group 6: How might we improve social innovation by utilizing non-traditional distribution points?

ning (collectively developing a strategy for implementing solutions). The problem selection stage built on the findings from the literature review, problem-tree analysis, and mind-mapping exercises and created a “challenge statement menu” in order to help groups frame and align the focus of the CPS session around the key issues and opportunities identified. The “program menu” for our event (called “Creative Ideas Factory Feature Items”) featured 12 challenge statements that flowed directly from the literature and research. These challenge statements were framed as opportunities for social innovation in food programming (see Figure 4).

After reviewing each of the challenge statements, participants were invited to engage in a process of “dot voting”; wherein participants were asked to affix three sticky dots on the challenge statements they felt were the most important (or promising) and could be addressed by the group. At the conclusion of the dot-voting exercise, groups were invited (collectively) to discuss results and select (or revise) a challenge statement to be pursued for their CPS workshop session (see Figure 5).

The selected and revised challenge statements served as the foundation for the ideation stage of the workshop. During this phase, participants were asked to respond to their chosen challenge statement, which was stated in open-ended language, using the hallmarks of the Osborn-Parnes CPS program: divergent thinking and convergent thinking (Rose & Lin, 1984; Scott et al., 2004; Torrance, 1972). To achieve the former, groups were guided through a “stick-em up” brainstorming activity that encouraged them to generate as many responses to their challenge statement as possible, while also suspending evaluative judgement so as to continuously build upon and embrace one another’s seemingly wild and/or unusual ideas. These principles were encouraged with a view toward fostering maximum group participation and diversity, novelty, and creative expression. Once a sufficiently diverse set of options, ideas, and possibilities was generated, groups were guided through a convergent thinking exercise that involved both dot-voting and idea clustering to facilitate idea vetting, evaluation, and selection discussions that prioritized novelty and affirmative judgements when deciding on viable solutions for further development and stating these as “solution statements” (e.g., what I see us doing is ...) that best expressed their chosen alternatives. This exercise is depicted in Figure 6.

**Figure 6: Picture from creative problem-solving**



The third phase of the CPS workshop involved the development and refinement of the chosen solutions into more robust, concrete social innovations that could then be framed as fundable solutions to food insecurity in Halton. Here, the team of facilitators helped groups negotiate a variety of tools to evaluate the components, resources, and limitations of the chosen alternative. First they encouraged groups to articulate how their chosen solution would actually work by explaining five to seven key features of their social innovation. Then they engaged in a stakeholder analysis activity to identify the key actors and their roles and expected contributions, as well as any anticipated challenges involved in the execution of this targeted solution. The workshop ended with participants being given 25 minutes to develop a two-minute pitch for their group's targeted—and fundable—solution to food insecurity in Halton.

The two-minute pitch portion resulted in six different innovations. The innovations focused on improving intake systems, the distribution of food, food literacy, and community partnerships. “Mission Nutrition: Building Access to Healthy Food” and “Path to Plate” were presented as solutions to existing issues within the present intake system. Currently, most of the organizations in Halton require their own eligibility testing prior to access, different personal identification, and have varying limits on the amount of times a family can access food within a month. Both innovations included a common intake system wherein users build specific profiles and become registered within a common, online system (possibly managed by the region).

The “Mobile Hub” and “S.P.A.C.E Hub” were two different innovations that addressed access to food programs. These creative programs both offered non-traditional distribution points for those who have difficulty accessing services, while also recognizing that those facing food security challenges are also often confronted with a host of other issues that need servicing simultaneously. The Mobile Hub is a mobile service unit in the community that provides access to services such as food, mental health, and professional supports in response to community needs. As a service vehicle, the Mobile Hub would have the capacity to travel throughout the community and feature breakout stations (tents/tables) to enable service offerings, user registration, and donations intake. The S.P.A.C.E Hub is an integrated neighbourhood hub to address these same needs. The core of this innovation is a re-centring and re-grounding of philanthropic service provision (e.g., food programming, coupled with other social service offerings) at the level of individual community satellites, which are linked together through a centralized hub/base. The community satellites could be centred in schools or other local buildings, mobile units, or virtual sites and would feature service and resource offerings that are fluid and adaptable to local community needs and assets, but are also linked together through the centralized hub in order to coordinate action and intake processes.

“Interconnected Centre for Careers in Food and Farming” aims to create a space and infrastructure to provide food members (and others in the community) with an opportunity to develop the skills necessary for careers in the food sector for our neighbours in need. The innovation is to provide a site and program that teaches food skills to members of the community, including food safety, handling, growing/farming, and business development. This innovation provides unique opportunities for industry collaboration in skills training and food provision and has the potential to develop into a social enterprise.

The final innovation, “Sponsor a Family Program for Food Security,” focuses on community involvement in helping to care for the less fortunate members in Halton. The goal of this social innovation is to improve access to healthy food for food programming users through matching donor families with service providers in order to provide specific meals (and other services as appropriate) for food programming members. Similar to the many programs in the Halton Region geared to sponsoring a family for Christmas, the innovation would leverage the generous donations of community members—those willing and able to donate prepared meals for food program users. Sponsor and recipient families could be matched



directly or the service agencies could serve as the go-between. It was widely held that the innovation could greatly enhance wider community investment and involvement in neighbour food recovery.

### Stage three: The Think-In

Researchers brought an analysis and report on the findings and recommendations generated in the Discovery and Problem-Solving stages to OCF fund holders (donors) in November 2017, in a meeting called the Think-In. Here, the findings from two of the four pillars (namely, affordable housing and food security) were presented and discussed. The three-hour Think-In meeting was divided in half, with an hour and a half allotted to discussing each pillar. For each pillar, the discussion was structured as follows: a) the researchers presented a summary of the findings from the Discovery stage; b) the researchers presented the social innovations developed in the Problem-Solving stage; c) the researchers presented the emergent themes from their cross-sectional analysis of the literature review, Discovery stage, and Problem-Solving stage; and d) an open discussion of the emergent recommendations.

In the food security discussion, a summary of the results was reported. Additionally, the researchers highlighted three emergent themes that appear to be consistent across the literature and the findings from both the Discovery and Problem-Solving stages. These are: a) the need for enhancing food transportation and distribution systems in Halton, including novel adaptations and enhancements that help get food to low-income, high-density communities; b) the need for more creative food literacy programs that empower informed, collective choices and appreciate the impact of food choice on finances, health, community, and the local environment; and c) the need for a centralized and streamlined intake system for users and agencies alike that improves the flow and coordination of information and service provision between users and service providers.

### Stage four: The BeCause RFP

The discussions from the Think-In gave rise to the production and issuing of two RFPs by the OCF in January 2018. The strategic priorities for the new RFPs were decided upon by fund holders, but they directly aligned with the emergent themes, findings, and recommendations discussed and refined during the Think-In. In the area of affordable housing, the new RFP called for submissions for emergency shelters and alternative housing solutions (two of the four emergent themes identified). In food security, the new RFP was positioned more broadly around granting priorities for projects that would advance work on common intake systems, alternative food distribution networks, and/or food literacy programs. Proposals were eligible for single-year or multi-year support.

### Stage five: The Philanthropitch

On Tuesday, April 17, the authors of five short-listed proposals (derived from both RFPs) presented their submissions to the fund holders and other community members (including the CIF research team) during the OCF's first-ever "Philanthropitch" event (see Figure 7).

Figure 7: The Philanthropitch Event



Following each presentation, fund holders were invited to ask questions and seek clarification from applicants. Following the event, fund holders and the OCF deliberated. In late May 2018, the approval of three projects (two in affordable housing and one in food security) totalling over \$257,000 in community granting was announced. The approved projects were as follows:

In housing:

- *Alternative Housing for Halton*: A feasibility study of new low-rent housing units put forward as joint submission between Affordable Housing Halton, Kerr Street Mission, Halton Housing Alliance, Home Suite Hope, Community Living Burlington, and Housing Alternatives New Directions.
- *Community Resilience Hubs*: A proposal for new community outreach hubs put forward by the Faith & Common Good (Centre for Social Innovation), the Halton Environmental Network, and the Town of Oakville.

In food security:

- *The Margaret Garden Community Project*: A feasibility study for a new community site featuring a community kitchen with food literacy programs and with limited capabilities for emergency shelters. Home Suite Hope, Kerr Street Mission, and Design Quorum Inc put forward this proposal.

## DISCUSSION

As researchers and active participants in this process, we learned a number of important lessons about participatory change initiatives in the context of philanthropy. First, we learned that bottom-up participation is not an easy business. Here, we are perhaps our own sharpest critics. In reflecting upon the final process for the new RFP, we recognize that, to a significant extent, the final process does not cede decision-making power to local communities. This echoes a critique of PRA by Williams (2004) that it would be naïve to think that it would do so. Moreover, critics might rightly point out that bottom-up participation has been embraced here in a rather perfunctory manner and that a hierarchical organizational culture that privileges the voices of donors continues to pervade the process (Leurs, 1998). Additionally, in several areas, we might have done a much better job incorporating the principles of participatory development, including, but not limited to, the inclusion of more prominent and sustainable feedback mechanisms as well as design features to support the on-going maintenance of trust with our users. By our own admission, we were, at times, overwhelmed by the administrative challenges of building stronger mechanisms and maintaining the necessary relationships with the large and disparate groups of individuals who engaged with the process across its multiple stages.

Second, our experience demonstrates that participatory outcomes are very often the product of the negotiated struggles, competing interests, and organizational constraints that operate within complex environments such as philanthropic networks. While we, as academics and researchers, may be free to advocate and pursue whatever form of project we think is best, our community partners are not. This insight lends credence to the utility of the theory of the political economy of participation, which openly recognizes the containing role of interest, mandates, agendas, and power capabilities in determining the outcomes of participatory change initiatives. Quite clearly, the form and content of the final RFP process reflects a number of these realities. First, the organizational and financing structure of the OCF (and community foundations across Canada) means that fund holders (donors) have a place of prominence in decision-making. Here, the leadership at the OCF built a compelling case for fund holders to embrace a more participatory approach in the RFP process, but that case was *necessarily* built around the *instrumental* value of appealing to donors (i.e., bottom-up information and evidenced-based decision-making will lead to a more effective and strategic use of donations). Moreover, given that the long-term sustainability of the new process is dependent upon the buy-in and support of fund holders, the leadership at the OCF actively and positively incentivized fund holders by including them in the decision-making process—albeit only at the later stages and within the recommendations brought forward from the front lines. This manoeuvre, reminiscent of strategies discussed by Tandler (1997), was both creative and necessary for the long-term sustainability of the system.

Only, as Hira and Parfitt (2004) suggested, when we openly recognize the mix of actors, interests, and power capabilities within an environment can we truly explain why and how participatory change initiatives end up looking the way they do. Third, against our own self-criticism, we should resist seeing this project as a failure. There are several notable, if incremental, achievements of the undertaking. First, and perhaps most significantly, this is the first time that users and service providers have been granted the opportunity to shape the scope and agenda of community granting in Halton. Here, the initiatives that were awarded funding through the RFP process speak directly to the challenges identified by users, as well as to the solutions developed by service providers. In this sense, the OCF has made significant strides toward ensuring its community granting is evidenced-based and aligned with the needs of local beneficiaries. Moreover, by bringing the voices of users and service providers into the process, the project is beginning to unlock a whole new series of conversations and relationships that can help erode and break down the culture of top-down decision-making that has historically defined philanthropy in our area. For example, several fund holders, impressed by the Think-In conversations, are now entertaining the prospects of an ongoing meet-and-greet with users in the interests of building relationships and understanding between previously disparate stakeholder groups.

The project also yielded tremendous informational gains garnered through the participatory exercises. Here, the PRA exercises yielded a rich and complex picture of the experience of food bank users. For example, the cause-effect mapping in the problem trees gave us a much more nuanced and complex understanding of the users' concerns about stigmatization and the challenges they face in navigating the current system. The mind-mapping exercises again highlighted users' challenges with stigmatization and program intake, while pointing to new program opportunities for combining food programs with other programs and/or sites (e.g., offering food services and food literacy programs at low-income housing sites). Beyond the story they tell, these data visualizations present complex information in a manner that is compelling, accessible, interpretable, and marketable for stakeholders in the business of philanthropy (e.g., the OCF, service providers, and donors).

## **CONCLUSION**

The Community Ideas Factory achieved its objective of developing solutions to the challenges identified in the vital signs research. In doing so, it has also provided a new granting process that allows intended beneficiaries, service providers, and fund holders to be engaged, in varying ways, in selecting the priorities, and stewarding the OCF's granting dollars. This experience reveals the outcome of participatory change initiatives to be a product of complex negotiations, which are best appreciated and understood through a political economy approach to participation. Moreover, the experience also reveals that, even where participatory initiatives fall short of empowerment, they may still yield incremental gains, the value of which may not be immediately evident.

## **NOTE**

1. Thirty percent of families were identified as severely food insecure, 32 percent were moderately food insecure, and 13 percent were marginally food insecure. This study also reported that an overwhelming 91 percent of families indicated they would have needed to spend more money to meet the needs of their household compared to the previous month at the time of the interview (Loopstra & Tarasuk, 2012).

## **WEBSITES**

Affordable Housing Halton, [www.affordablehousinghalton.ca](http://www.affordablehousinghalton.ca)

Kerr Street Mission, [www.kerrstreet.com](http://www.kerrstreet.com)

Halton Housing Alliance, [www.affordablehousinghalton.ca/alliance](http://www.affordablehousinghalton.ca/alliance)

Home Suite Hope, [www.homesuitehope.org](http://www.homesuitehope.org)

Community Living Burlington, [www.clburlington.ca](http://www.clburlington.ca)

Housing Alternatives New Directions, <https://clnh.on.ca/h-a-n-d-housing-alternatives-network-directive>  
The Faith & Common Good, Centre for Social Innovation, [www.faithcommongood.org/halton\\_peel.org](http://www.faithcommongood.org/halton_peel.org)  
Halton Environmental Network, [www.haltonenvironet.ca](http://www.haltonenvironet.ca)  
Town of Oakville, [www.oakville.ca](http://www.oakville.ca)  
Design Quorum Inc., [www.dqi.ca](http://www.dqi.ca)

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**ABOUT THE AUTHORS / LES AUTEURS**

**Michael J. McNamara** is Project Director of the Community Ideas Factory and a Professor of Creativity and Creative Thinking at Sheridan College. 1430 Trafalgar Road, Oakville, Ontario. L6H 2L1. Email: michael.mcnamara@sheridancollege.ca.

**Sara J. Cumming** is a professor of Sociology with the Faculty of Humanities and Social Sciences at Sheridan College. She teaches and publishes in the areas of introductory sociology, participatory action research, gender, social inequality, xenophobia and social policy. Email: sara.cumming@sheridancollege.ca .

**Jessica Pulis** is a professor of Criminology at Sheridan College. Her research specializations include social regulation, corrections, young offenders, and the experiences of marginalized persons, in particular women and girls and Indigenous peoples, in the criminal justice system. Email: jessica.pulis@sheridancollege.ca .