

# GOVERNANCE EVALUATION REPORT

SHIFT CENTRE FOR SOCIAL TRANSFORMATION

## EXECUTIVE SUMMARY

SHIFT is a social transformation organization at Concordia University in Montreal that provides support, in the form of funding, connections and education resources, to socially transformative initiatives aimed at reducing injustice, inequity, and unsustainability on a systemic level within the educational institution and the city itself. Since the inception of the organization in 2018, it has been integral to its mission to create a governance structure that empowers its community to have shared decision-making power over SHIFT's mandate and resources. To this end, a novel dynamic system of governance has been developed and is evolving at SHIFT. What follows is a summary of the first governance evaluation exercise taken at SHIFT, with the guidance of SHIFT's Governance Hub.

This evaluation project aimed to improve the effectiveness of SHIFT's governance model, deepen understanding of collaborative governance, and promote the dissemination and use of research findings beyond the organization. To this end, cultural mapping was used to ask members to depict their experience of the organizational model visually and then to talk about this depiction with their peers. These maps and the conversations that followed were analyzed and shared internally to generate some recommendations moving forward about the governance model at SHIFT.

Our findings suggest that more can be done to clarify the model to members as they engage with the unique and dynamic system of governance at SHIFT. Further, additional clarity around the distinction between advice-seeking and decision-making within different hubs and committees could help members understand their role within the broader organization and how they may be able to engage with the process of mobilizing power at the organization.

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## CONTEXT

The SHIFT Centre for Social Transformation (SHIFT) at Concordia University in Montreal provides support, in the form of funding, connections, training and capacity-building resources, to socially transformative initiatives. The multi-stakeholder teams SHIFT supports work on social issues related to injustice, inequity, and unsustainability on both the material and systemic levels, focusing on particular systems within the educational institution itself, distinct social sectors, neighbourhoods, or the scale of the whole city. Since the inception of the Centre in 2018, it has been integral to its mission to create an internal structure that enabled its community to take leadership in decision-making regarding SHIFT's mandate and the allocation of its resources. As such, an essential aspect of the uniqueness of SHIFT is its collaborative, community-oriented governance structure, nested within the existing hierarchy of a post-secondary academic institution.

The choice of this approach to organizing is a core tenet of SHIFT's ways of working, as welcoming community members in its governance framework brings "accountability and transparency to key decisions and ensures that our programs and actions are aligned with our mission, vision, values and ways of working."<sup>1</sup>

To better understand to what extent these objectives are being realized and to garner insights from the community to improve the health of the governance system over time, an evaluation process was launched in 2021. The evaluation sought to clarify to what extent power is being shared within SHIFT, and how transparent the structure is to community and university partners. Finally, the evaluation and documentation process aimed to serve as an important contribution to how SHIFT is not only supporting socially transformative initiatives and espousing social justice values, but it is also in practice acting as a social transformative initiative itself. Conducting a governance evaluation, and communicating the findings within the community, provides one more tool that supports SHIFT in being held accountable to its numerous stakeholder groups.

To that end, the SHIFT Governance Hub (GovHub) undertook an evaluation to map how decision-making and resources are perceived to be distributed within its complex network of internal, institutional, and community connections and relationships. This report shares our approach to this exercise as well as its findings.

## THE APPROACH

The research project that accompanies the organizational evaluation aims to achieve three interconnected objectives. Firstly, the project aimed to improve the governance model's effectiveness by identifying gaps and creating opportunities for those involved in governance to identify problems and solutions throughout the evaluation process. This approach is referred to as developmental evaluation, which aims to promote learning and adaptation while simultaneously evaluating a program or intervention.

Secondly, the research project aimed to enrich the level of understanding across SHIFT of what collaborative governance is, how it contributes to the organization's mission and vision, and how participants can contribute to its effectiveness. This objective is focused on seeding reflexivity, which is

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<sup>1</sup> <https://www.concordia.ca/about/shift/what-we-do.html>

the process of reflecting on and critically examining the assumptions, values, and practices that underpin a particular approach or intervention.

Lastly, the research project aimed to document and draw conclusions about the effectiveness of the model, and to share this knowledge beyond SHIFT community members. This objective is focused on knowledge mobilization, which involves disseminating research findings to relevant stakeholders and promoting the use of evidence to inform policy and practice.

To this end, we opted for cultural mapping as a methodology for this evaluation, as this approach provided an opportunity to explore and capture the subjective, individual perceptions of SHIFT as an organization, while also being able to note patterns or findings that might guide the next steps in a more general manner. SHIFT members were invited to draw maps representing how they saw resources being distributed at SHIFT, then discuss the drawing they made with another community member, and finally share their reflections with the group as a whole in a discussion. This approach allowed a richness of information to be gathered, as members were able to express themselves using multiple modalities. The specifics of the method are detailed in the Method section found on page 15.

Part of the value of applying this method at this point in SHIFT's history, a year after the model was implemented, was to ascertain whether the SHIFT model of governance is functioning as it has been designed. In asking staff, hub, jury, and committee members to visually depict their understanding of SHIFT's flows of resources, we can see to what degree this conforms with the extant model and inquire into the differences, if any, of experiences within the organization.

# TERMINOLOGY

*A non-exhaustive list of terms and concepts used in this report*

**Collaborative governance:** A governance system that prioritizes integrating perspectives from diverse positions within the organization when making organizational decisions, as opposed to concentrating power, information and authority amongst those at the top of a hierarchy.

**Sociocracy, Holacracy:** Examples of organizational systems or approaches to governance that operate collaboratively. These approaches each come with a set of tools, principles, and practices that ensure shared power. For more information, visit [sociocracyforall.org](https://sociocracyforall.org) and [holacracy.org](https://holacracy.org)

**Social transformation:** “An intentional process of systemic change to address not only the symptoms but the root causes of inequity, injustice and unsustainability” is the definition SHIFT uses of social transformation, developed by members of its Steering Committee.

**Governance framework:** The set of principles and practices that describe how decision-making is carried out through an organization, including which individuals and groups make which decisions. The purpose of SHIFT’s governance framework is to create accountability and transparency and to ensure that our programs and actions are aligned with our mission, vision, values and ways of working.

**Theoretical governance model:** The conceptual or “on paper” version of how our governance system works. We use the notion of the ‘theoretical governance model’ to recognize that how a system is designed is frequently not how it is finally built and/or experienced.

**Developmental evaluation:** An approach to evaluation that aims to promote learning and adaptation while simultaneously evaluating a program or intervention.

**Knowledge mobilization:** The process of disseminating research findings to relevant stakeholders and promoting the use of evidence to inform policy and practice. The objective of knowledge mobilization is for knowledge developed and documented within a particular domain (often academia) to be accessible and beneficial to people outside of that domain.

**Cultural mapping:** A research technique that invites participants to create a visual representation, in the form of a map, of an aspect of their experience, and then use that map as the basis for further discussion. We chose this approach because of the balance it offers between the richness of information about the individual’s experience (each person making their own map) and the potential to draw larger conclusions about shared experiences (through comparing themes that emerge in discussion).

**Consent-based decision-making:** An approach to making decisions as a group where a proposal is approved when none of the members object. Often contrasted with *consensus* decision-making, where a proposal is accepted when all members approve. Setting the standard for decision-making at the level of “consent” as opposed to “consensus” is a tool for enabling groups to move forward with a decision even when some members don’t feel that it is ideal or their preferred course of action, as long as everyone agrees that the proposal is “good enough for now and safe enough to try.”

# SHIFT STAKEHOLDER GROUPS, MEMBERS & PARTNERS

*An overview of SHIFT community participants and collaborators*

**SHIFT Members:** Throughout this report, we use the term “SHIFT members” to refer to people who are involved in SHIFT by either directly benefiting from SHIFT’s resources or being directly involved in decision-making about SHIFT’s resources (or both). These include:

- *Steering Committee (SC) members & hub members:* When a person applies for and is selected to join a hub or the Steering Committee, they become a member of SHIFT by virtue of that role. SC members and hub members sign yearly agreements that outline their commitments, responsibilities and scope of decision-making. When a person leaves their role, they may continue to participate in the SHIFT community through attending events or developing collaborations. However, they will no longer participate in formal decision-making about SHIFT’s resources.
- *Staff members:* The 5 full-time coordinators who are paid SHIFT staff members are considered to be members of SHIFT and are responsible for the majority of operational decision-making. Part-time staff members may be involved in program-level decision-making, depending on their role.
- *Project teams:* Groups apply to SHIFT for funding as members of multi-stakeholder teams, often bringing together people from multiple organizations or a combination of staff members at an organization along with a researcher or student involved in a project. The team of applicants who are directly responsible for the project and who are in regular communication with a SHIFT staff member are considered SHIFT members.
- *SHIFT interns:* Concordia students may apply for paid, part-time or full-time positions to work with SHIFT-funded project teams. As interns directly benefit from SHIFT’s resources and directly contribute to socially transformative impact through the work of the project teams, they are considered members but are not involved in SHIFT’s organizational decision-making in their role as interns.
- *Jury members:* Juries are convened on an as-needed basis to assess applications and allocate funding. Once a jury has completed the selection process, the jury is dissolved and those who participated do not have an ongoing responsibility to participate in SHIFT decision-making.

While these categories are described as distinct above, many SHIFT community members hold multiple roles. Furthermore, while project team members and interns are not implicated in decision-making by virtue of benefiting from SHIFT’s resources, nearly all decision-making bodies at SHIFT include people who can contribute these perspectives. Tools such as evaluation processes, programming debriefs and consultations create avenues for their experiences and priorities to guide decision-making.

**SHIFT Ecosystem & stakeholders:** The “wider SHIFT ecosystem” refers to the spectrum of collectivities that SHIFT’s mission seeks to be responsive to. Members of the SHIFT ecosystem may not necessarily self-identify as such, or even be aware that SHIFT exists. These include:

- *Social transformation actors across Montreal:* People working from a diversity of approaches to bring about social transformation in their field, in particular people from the community development sector; activists and community organizers; those leading or accompanying social economy and social entrepreneurship initiatives; etc. The initiatives led by these actors are seen

as complementary, overlapping or mutually reinforcing of SHIFT's mission. As such, SHIFT governance bodies seek to include people from across this field to inform our positioning and potential for collaboration.

- *Partners in systemic change:* These actors represent sites of major potential change for social transformation efforts, such as philanthropic sector partners; institutional partners; government agencies and private sector actors. As many of the projects funded by SHIFT are impacted by and/or seek to impact these actors, building relationships and creating opportunities to learn about their sectors is essential. However, remaining mindful of how vast structural power imbalances can impact organizational priorities, stakeholders from these groups are mostly invited to participate in non-voting roles or are in a minority role within any decision-making group.
- *Concordia partners:* Reciprocal relationships with Concordia and with Concordians are pivotal to SHIFT's mission. Concordia faculty, staff and students are deeply embedded in all aspects of SHIFT, including governance roles, funded project teams, as jury members and as interns. Beyond their engagement as individuals, SHIFT prioritizes embedded university relationships to support institution transformation towards social impact.



## THEORETICAL GOVERNANCE MODEL

This section will explore the governance model currently in place at SHIFT. We use the notion of the ‘theoretical governance model’ in this section to recognize that how a system is designed is frequently not how it is finally built and/or experienced. That said, as we will see in the first part of this section of this report, non-traditional approaches to governance have been a constant consideration in the development of SHIFT.

### DYNAMIC GOVERNANCE

Participatory or collaborative governance models have been of interest increasingly within the social impact and philanthropic sectors, and wherever importance is placed on transparency, inclusivity, and equity. Sometimes referred to as ‘dynamic governance,’ such models can more effectively distribute power and authority among a wider base of participating members than many traditional structures. Organizations using these models commonly rely on consent-based decision-making and include procedures to facilitate disparate voices being heard at moments when decisions are being made. As a result, groups can benefit from having access to information and insights informed by a range of experiences, which can ultimately lead to more informed and wiser decision-making throughout the organization in a manner that better meets the needs of community members.

Additionally, this approach to governance can help build trust and foster a sense of ownership over the resources that the organization has access to, and engender a personal investment among community members in its functioning, leading to more effective and sustainable outcomes. Overall, dynamic governance provides a powerful tool for promoting social equity and strengthening community engagement and collaboration.

Participating in dynamic governance structures like the one implemented at SHIFT can also bring benefits to the individuals involved. This model empowers individuals who may not typically have the chance to have their voices heard, and it instills in them the belief that their needs and voices matter. SHIFT posits that when individuals experience being heard within diverse groups including people with different levels of structural power, they are supported in envisioning alternative structures that could allow for this experience to occur elsewhere in society.

While such dynamic models have many benefits, they diverge from how many of us have learned to organize. The principles that underpin SHIFT's governance model challenge the more hierarchical (and often bureaucratic) models that prevail in institutional settings such as within universities, so the road to good governance has a few twists and turns. This section of the report will provide some history of the emergence of the theoretical model governing the organization at the time of the initiation of this governance evaluation exercise.

## A BRIEF HISTORY OF GOVERNANCE AT SHIFT

SHIFT's governance model aims to achieve four main objectives:

1. Accountability to SHIFT stakeholder groups.
2. Stewardship of resources is informed by a diversity of perspectives.
3. Leveraging shared power as a tool for community engagement.
4. Enabling SHIFT to play the role of a socially transformative initiative itself.

To meet its organizational objectives, members of SHIFT explored governance as a program area, with the idea that the structure of the organization itself could model SHIFT's ideals and be leveraged to further encourage social transformation and develop long-term relationships with social initiatives and actors in and out of Concordia. There are numerous approaches to doing this, and the approach has evolved in the few years SHIFT has existed.

## MILESTONES IN SHIFT'S GOVERNANCE MODEL DEVELOPMENT

There were a series of essential governance decisions which contributed to the current model at SHIFT over time. These included:

### COMMUNITY OWNERSHIP AS A CORE VALUE

In January 2018, an Interim Leadership Team was assembled of Concordia staff, faculty and students. This group was tasked with developing the mission, vision, and values that would guide SHIFT's activities. Experimenting with alternative governance was one element of the leadership team's plan, but it was not the sole focus of their work. The community consultations that were held before the Centre was officially launched helped identify potential concerns with the proposed cluster-based governance model, and in the end, this approach was considered too ambitious and vague at the early stages of the formation of SHIFT. Therefore, in SHIFT's first year, it adopted a more traditional style of governance, which included a staff team and a Steering Committee.

Throughout SHIFT's first year of operation, fall 2019 – fall 2020, activities were focused on creating tangible manifestations of the SHIFT vision and values to attract values-aligned individuals and groups to join the community. During this time, two working groups were convened to accompany and monitor SHIFT's work and make recommendations for how its program offerings and governance model could evolve in the years to come. The Program Evaluation Working Group and the Governance Working Group played significant parts in SHIFT's commitment to ongoing evaluation and development.

### GOVERNANCE WORKING GROUP RECOMMENDATIONS

To maintain the integrity of their commitment to participatory governance models, the Governance Working Group was tasked with evaluating and making recommendations for the evolving governance model. The group looked to leverage the strengths of the existing model – namely the diversity of perspectives present on the Steering Committee – while exploring how other models could benefit SHIFT's longer-term objectives. In the spring of 2020, the working group presented their recommendations for how the SHIFT governance model could evolve, inspired by concepts from holacracy, sociocracy, and organizational development theory.

### PROPOSAL OF A DYNAMIC GOVERNANCE MODEL

The transition to a more responsive horizontal collaborative governance model was proposed to the Steering Committee in the fall of 2020, with the intent of improving and expanding upon the existing

participatory governance structure at SHIFT. The model included four locations of decision-making groups (see purple circles in Figure 1 SHIFT Governance Model, 2022), each with their mandate and spheres of responsibility: the Steering Committee, program-specific hubs, program teams, and a staff team. The notion was that information would flow between these groups, via members that were cross-posted in more than one group, which included the SC Liaisons, Program Leads, and the Senior Director of Community Engagement and Social Impact. The next section of the report describes the model in greater detail.

The initial proposal for the governance model included the launch of five program-specific hubs, but only two were ultimately created after the SHIFT Steering Committee (SC) raised concerns about the scale of ambition of such an initiative.

At that time, the SC identified concerns related to the SHIFT governance model, namely:

1. The risk of the experimentation in governance being complicated, bureaucratic, and consuming staff and community time and resources.
2. The potential lack of clarity about decision-making authority among the multiple groups involved could result in confusion and inefficiency.
3. A need for effective evaluation processes to assess the impact of the new model.
4. The need for hub members to commit sufficient time to be meaningfully informed and engaged with the work, to make sound strategic decisions at the program level.

To address these concerns, staff members proposed a scaled-down version of the original proposal that allowed for smaller-scale experimentation. The adjusted proposal included the launch of just two program hubs, the Gov Hub and the Funding Hub, each with 18-month mandates running from January 2021 - July 2022.

In January 2023, with consent from the Steering Committee, staff members launched two additional hubs.

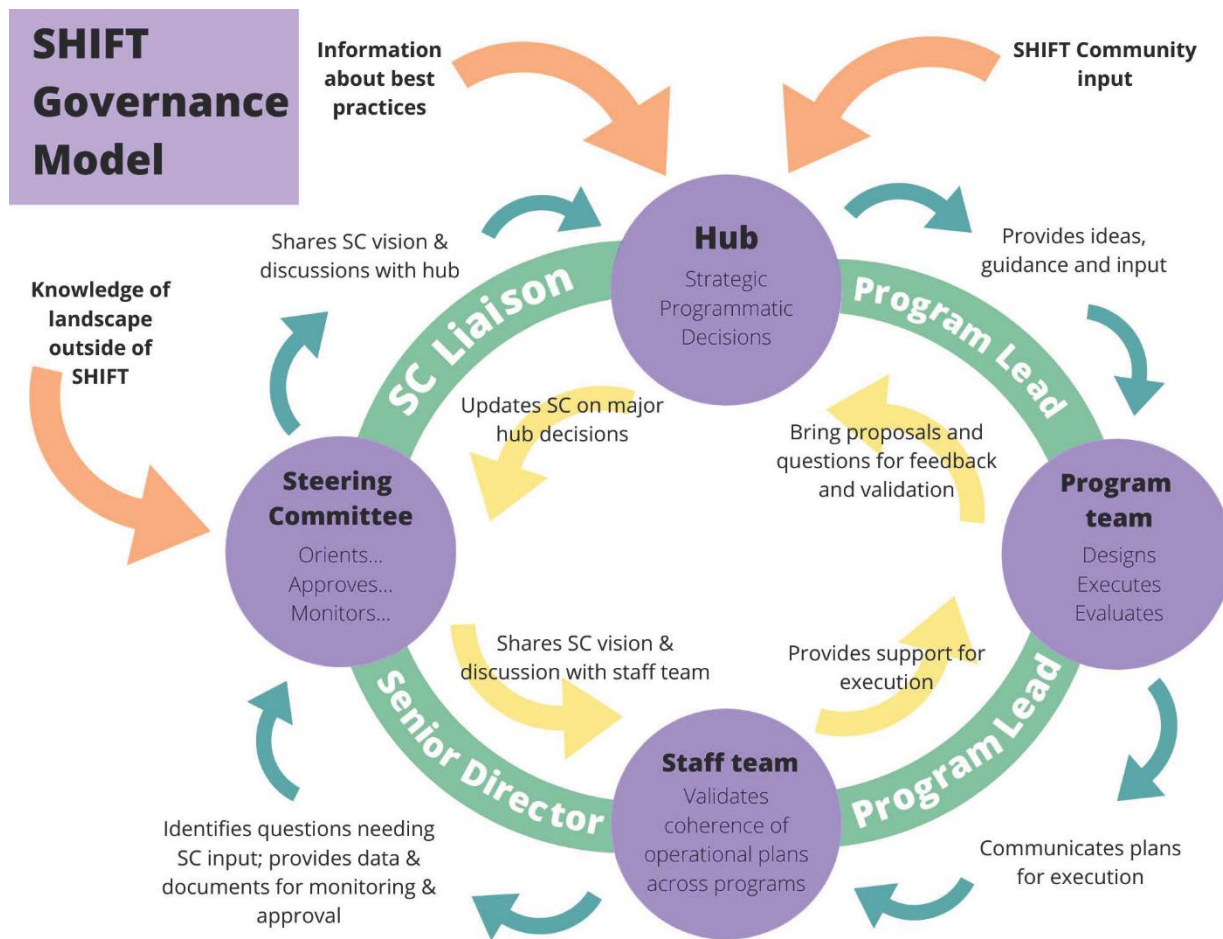


FIGURE 1 SHIFT GOVERNANCE MODEL, 2022

## ELEMENTS OF THE THEORETICAL GOVERNANCE MODEL

To understand how dynamic governance functions at SHIFT, it is necessary to understand its different components and their involvement in the adoption of this model.

### STEERING COMMITTEE (SC)

This group is responsible for high-level organizational decisions, setting overall strategic priorities for future directions and overseeing resource allocation in line with SHIFT's mission, vision, values and ways of working. The SC brings together people from SHIFT-funded project teams, those who bring domain-specific expertise, students, senior university administrators and people with lived experience of the social issues being tackled in an environment where all can contribute their perspectives to organizational decisions. The SC is designed such that those who are impacted by strategic decision-making at SHIFT in terms of resource allocation have a representative voice at the table.

As part of the agreement between Concordia and the donor, a representative of the Saputo family foundations may sit on the Steering Committee as a non-voting member. The Executive Director of the Mirella and Lino Saputo Foundation participated regularly in Steering Committee meetings over the first two years. However, since a leadership transition at the foundations in 2021, no donor representatives have participated in the Steering Committee.

## HUBS

There are currently 4 hubs at SHIFT: Fund Disbursement, Participatory Governance, Ecosystem Activation, and Collaborative Space.<sup>2</sup> Hubs play an important role in ensuring that decisions made at a programmatic level are informed by the perspectives of community members who either have domain-specific expertise or would be impacted by the decisions made about the program area. Each program hub consists of 4-6 members of the SHIFT community or wider ecosystem. Hub members provide input on new work areas, give feedback on staff proposals, and approve major strategic decisions related to their program area. Each hub includes at least one member playing the role of the SC liaison, and one staff member who is the lead on that specific program area. These members hold the responsibility of sharing information, questions and decisions taken between the hub and the SC or hub and the staff team respectively, thus ensuring coherence between program areas at an operational level.

The hubs are instrumental in ensuring that SHIFT remains connected to the needs and concerns of its members and stakeholders and that the organization can effectively implement its mission and goals to contribute to social transformation within the Concordia and Montreal communities.

## PROGRAM TEAMS

The SHIFT program teams are the site of all major operational decisions regarding programming design, execution and evaluation. Each program team is led by one of the five full-time SHIFT staff members and includes a second staff member in a support role as well as, in some cases, a part-time staff member. The support role can fulfil a diversity of needs at different times, including troubleshooting, brainstorming, landing on tough decisions and identifying questions that need to be brought to a hub, the Steering Committee or the staff team. As most staff members lead multiple dossiers and offer support to multiple different colleagues, the lead/support system creates an interdependent web supporting information flow and mutual support between colleagues.

## STAFF TEAM

There are currently 5 full-time staff members at SHIFT, along with four part-time staff members. The staff team also includes the Concordia Senior Director of Community Engagement and Social Impact, as well as a part-time administrative assistant.<sup>3</sup> The staff team is responsible for operational decisions that go beyond the scale of any individual program area, and the coordination of program-specific projects in line with the directions provided by the SC and Program hubs. Weekly staff meetings and monthly day-long collaborative work sessions provide occasions for staff to develop and adopt policies, procedures, and structures that affect the organization, and identify core questions to be addressed at the strategic level of the Steering Committee.

KEY SHIFT STAKEHOLDERS THAT ARE NOT DEPICTED IN FIGURE 1.

## PROJECT TEAMS

Project teams originate from outside of SHIFT and enter the organization when they apply and are selected to receive funding by a selection jury (see more information below). Project teams are multi-stakeholder, social transformation initiatives that include community-based and Concordia-based partners, and that are tackling a particular social issue related to equity, justice and/or sustainability in

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<sup>2</sup> At the start of this review process, the two latter hubs had not yet been launched.

<sup>3</sup> At the start of this review process there were 4 full time staff members

the greater Montreal area. Members of SHIFT-funded projects are invited to join the SHIFT Learning Community to engage in shared learning about social transformation.

Most of SHIFT's resources are oriented towards selecting and supporting project teams through funding, training, paid student internships and strategic relationship building. As such, project team members are critical stakeholders in decision-making about how SHIFT's resources are allocated. However, as project team members are primarily engaged with their initiatives, they are not required to participate in SHIFT's governance model. Where there is interest from project team members, SHIFT aims to have at least one SHIFT-funded project team member in all its governing circles.

#### SHIFT INTERNS

The SHIFT internship program facilitates paid experiential learning opportunities that match Concordia students with socially transformative initiatives across Montreal. SHIFT-funded project teams develop internship role descriptions based on their project's needs, and students from any Concordia faculty can apply for any role that is aligned with their academic or career interests. SHIFT facilitates matchmaking and provides payment directly to the student interns, reducing the administrative burden on project teams. By facilitating the placement of Concordia students with social transformation initiatives, SHIFT provides opportunities for students to gain valuable experience while contributing to social transformation and developing meaningful relationships with such initiatives.

SHIFT also offers training, support, and guidance to both students and host organizations to ensure a positive and meaningful experience for everyone involved. Furthermore, the internship program creates opportunities for students to connect, share their skills, and network with the broader SHIFT community.

#### SELECTION JURIES

SHIFT funding decisions are made by independent, community-led juries. The staff member who is the lead on the Funding Programs convenes a jury for each of SHIFT's funding programs on an as-needed basis. Each jury brings together people from a diversity of disciplines and sectors who are all committed to social transformation. Staff members prioritize including at least one member on each jury with expertise in all of the selection criteria: someone with a deep understanding of community organizing to support the group in evaluating the strength of community leadership in each application; someone with knowledge of Concordia's social change ecosystem who can provide nuanced interpretation of an applicant's Concordia-based relationships, etc.

Jury members are trained how to evaluate applications based on SHIFT's selection criteria, through a process facilitated by a SHIFT staff member. Following programming priorities and policies set by the Fund Disbursement Hub, juries decide which projects will enter the SHIFT community and receive funding and support.

# EVALUATION PROCESS

## OVERVIEW

To understand the extent to which SHIFT's governance model is achieving its aims, it became necessary to reach out to different members of the organization to better understand to what extent the model is experienced in a way that is reflective of the ambitions of its design. In keeping with the mandate of the Centre, the goal of the evaluation was not just to produce a final report, but to facilitate group discussions amongst SHIFT members and generate a collective understanding of how resources flow and how different members might play different roles within the organization.

In early 2022, the members of the SHIFT GovHub began the project of defining goals, exploring different potential methodologies, and implementing an evaluation of the governance model. Acknowledging that the tools used for the evaluation would have an important impact on the overall value of the evaluation's output, GovHub members researched a variety of evaluation approaches that centred community ownership, decolonial values and priorities and worldviews of Indigenous communities. Through this process, the hub identified features that the selected evaluation tool should be able to deliver:

- **Developmental approach:** the evaluation process and outcomes should improve the effectiveness of the model, not only help us understand whether the model is succeeding or failing.
- **Seeding reflectivity:** the evaluation process should create opportunities for conversations about SHIFT community members' experience of collaborative governance, surfacing knowledge within governance circles of how the model functions and problems within it, and in doing so deepen collective understanding of collaborative governance.
- **Knowledge mobilization:** the outcomes of the evaluation process should be useful to others interested in implementing dynamic governance in other contexts and enable SHIFT to more effectively communicate externally about its model.

Dr. Cheryl Gladu, a member of the SHIFT Gov Hub, was already working with a methodological tool called "cultural mapping" as part of her work with Dr. Will Garrett-Petts at Thomson Rivers University. Seeing potential alignment between SHIFT's evaluation objectives and the cultural mapping methodologies she was familiar with; Cheryl proposed this method as an approach to the evaluation project and members accepted.

The evaluation aimed to address several key questions for the organization, such as how the governance model is experienced across various hubs and committees at SHIFT, and whether it is contributing positively to advancing the organization's mission and vision in alignment with its values. By addressing these questions, SHIFT hopes to contribute to broader knowledge and learning about collaborative governance models beyond itself.

Moving ahead in the evaluation, the group worked collaboratively towards meeting both organizational and research objectives. Cheryl contributed leadership on the methodologies of the evaluation and the analysis of the results; research assistant Katarina Prystay supported implementation, data collection and documentation; staff member Stephanie Childs coordinated the evaluation process as a whole; and

hub members Kristen Young, Dr. Govind Gopakumar, Doris Nyilidandi and later, Shawna Moore and Marc D Lachapelle collaborated to develop research questions, the structure of evaluation objectives, and interpret, disseminate and implement findings.

## METHOD

Cultural mapping is a method of inquiry that combines two aspects with which to consider research questions. Firstly, via the generation of personal maps, we ask participants to depict their experience of a place through drawing and a retelling of what is depicted, which allows us to document, locate and quantify cultural and other assets of interest. These assets may be physical or intangible. The second lens is one of co-creation and participation and presents an opportunity to share the benefit of learning *with* participants rather than *about* participants. This perspective comes to us from the field of critical cartography and employs participatory mapping techniques to develop not just maps but a space in which participants can engage in dialogue and problem-solving with researchers and one another. Alongside increased demand for authentic engagement and understanding amongst diverse stakeholder groups, such methods are becoming more common in toolkits for public engagement.

That said, cultural mapping is not a typical approach to evaluating governance models. Nor is SHIFT a typical organization. The alignment between the benefits proposed by cultural mapping and the needs of a learning organization at the early stages of organizational development, such as SHIFT, were critical to the GovHub members' collective interest in pursuing this approach. However, considerable experimentation with the methodology was required to adapt the tools to SHIFT's particular context, and additionally to enable the tools to be used despite the changing public health restrictions related to social distancing. This included data collection via virtual cultural mapping sessions and an exhibition of maps and findings to share initial findings and hear from participants.

## CULTURAL MAPPING WITH SHIFT

Data was collected during a series of 2-hour voluntary workshops. To collect information about the experiences of SHIFT members from across the community, members from the Steering Committee, GovHub, Funding Disbursement Hub, Staff, and former jury members were invited to participate. In advance of the workshops, each remote participant was sent a kit of supplies (see Appendix 1, Cultural Mapping Kit, found on page 24), which included a brief description of the project and a consent form. Workshops were led virtually, sometimes with participants present in person with one another and other times with all virtual participants. Each workshop was delivered online via Zoom, within a meeting for different organizational committees or hubs at SHIFT. Audio from workshops was recorded and transcribed.

## WORKSHOP FORMAT

Following a welcome, a review of the consent form, and the presentation of opportunities to debrief the session afterwards if needed, the researchers introduced the practice of cultural mapping. This was followed by a review of the arts-based materials to be used for the mapping exercise, as well as an invitation to experiment with the materials. When the participants felt ready, we asked them to consider the prompt (see below) and gave them approximately 20 minutes to respond to the question using the materials in front of them. Instructions were given such that participants were able to draw images, forms, abstract forms and/or words, as needed.



### DRAWING PROMPT

“Draw a map of how you understand resources are distributed at SHIFT, with a focus on who makes the decisions and how. Resources can include time, money, expertise, etc. As this is your personal map, please consider how you are involved in these decisions to allocate resources, if at all.”

After each person completed their map, they were paired with another person (or persons, if the group was especially large) in the hub or committee, whereby they were able to interview one another about their responses to the above prompt, always starting with the interview prompt “please take me on the journey of your map.” We encouraged participants to explore one map at a time and gave some guidelines to the interviewers to explore the use of colours, lines, boundaries and other map elements, should there be a lull in the conversation. These conversations were recorded and transcribed.

### EXHIBITION OF MAPS

On October 20<sup>th</sup> and 21<sup>st</sup>, SHIFT hosted an exhibition called “Mapping SHIFT: Exploring Participatory Governance and Evaluation.” This event provided an opportunity to continue the conversation around governance at SHIFT and to allow map makers to gain insights from those involved in another aspect of the organization as well as share their thoughts before formally delivering findings to the organization. A video was produced to capture this event for later access.<sup>4</sup>

### ANALYSIS

A total of five workshops were conducted, and we collected a total of 23 maps and 14 interview transcripts (see Table 1 Participant count by committee or hub on page 17). A sample of these maps can be found in Appendix 2, Examples of SHIFT Maps, found on page 25. Following the collection of these maps and interviews, we made use of a novel cultural mapping analysis technique developed by Garrett-Petts and Heer Matonovich.<sup>5</sup> The technique draws on Kevin Lynch's 1960 book, *The Image of the City*,<sup>6</sup> which identified five distinctive features in mental maps:

1. **Paths:** routes along which people move throughout the city.
2. **Edges:** boundaries and breaks in continuity.
3. **Districts:** areas characterized by common characteristics or purposes.
4. **Nodes:** strategic focus points for orientation like squares and junctions; and
5. **Landmarks:** external points of orientation, usually easily identifiable physical objects in the urban landscape.

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<sup>4</sup> SHIFT Centre @ Concordia University. (2022). Mapping SHIFT: Using cultural mapping to assess SHIFT's governing structure. Retrieved May 17, 2023, from <https://www.youtube.com/watch?v=uwhEopDoF6w>.

<sup>5</sup> Heer Matonovich, S.; Garrett-Petts, W. (2021, 02). Cultural Mapping: Introduction and Interpretation (Virtual Workshop). [https://media.tru.ca/media/Review+of+Cultural+Mapping/0\\_eo0liwby](https://media.tru.ca/media/Review+of+Cultural+Mapping/0_eo0liwby)

<sup>6</sup> Lynch, K. (1964). *The image of the city*. MIT press.

**TABLE 1 PARTICIPANT COUNT BY COMMITTEE OR HUB**

Steering	8
Staff	5
Governance	4
Funding	4
Jury	4
Overlapping members	4
Total number of maps	23

Lynch argues that these elements are the building blocks of urban form and that understanding how they are perceived and navigated can inform the design of urban spaces that are more legible and navigable. Lynch's emphasis on the importance of legibility and navigation in urban design has informed the development of new design methodologies that prioritize the creation of urban spaces that are easier for people to navigate and understand. In addition, it has had an impact on the way that architects, urban designers, and planners think about the relationship between people and the built environment, highlighting the importance of user experience and perception in the design of urban spaces.

It is this aspect of his framework, which ascribes value to subjective experience and navigation that is particularly interesting in applying to the development and evaluation of other human-made systems, such as organizational designs. This is especially true in a context of shared power, where the ability to navigate the system effectively is central to the true accessibility of said power within a structure that looks to balance the strategic and operational aspects that go into successfully implementing the organization's objectives.

Heer Matonovich and Garrett-Petts propose overlaying Lynch's framework atop the drawings and accompanying interviews that make up the cultural mapping methodology. This allows researchers to have a deductive lens with which to first consider the information shared by participants during the draw/talk protocol and to identify points of commonality and difference in participants' maps while maintaining an appreciation of the whole system being mapped by individuals. Inductive elements are coded over time with each revisiting of the data.

Researchers first considered the maps developed by members of the SHIFT community in so much as they may depict paths, edges, districts etc. and consider where these elements are common or different and what these might tell us about the experience of a place or an organization such as SHIFT. You can see some examples of this in Appendix 3 Guidelines for the Lynch Framework on page 26. As the project proceeded emerging themes were presented to the Gov Hub for validation and consideration in terms of what these themes may point to in terms of the functioning of the governance model. This discussion allowed the Gov Hub to prepare a series of suggestions to present to the SC.

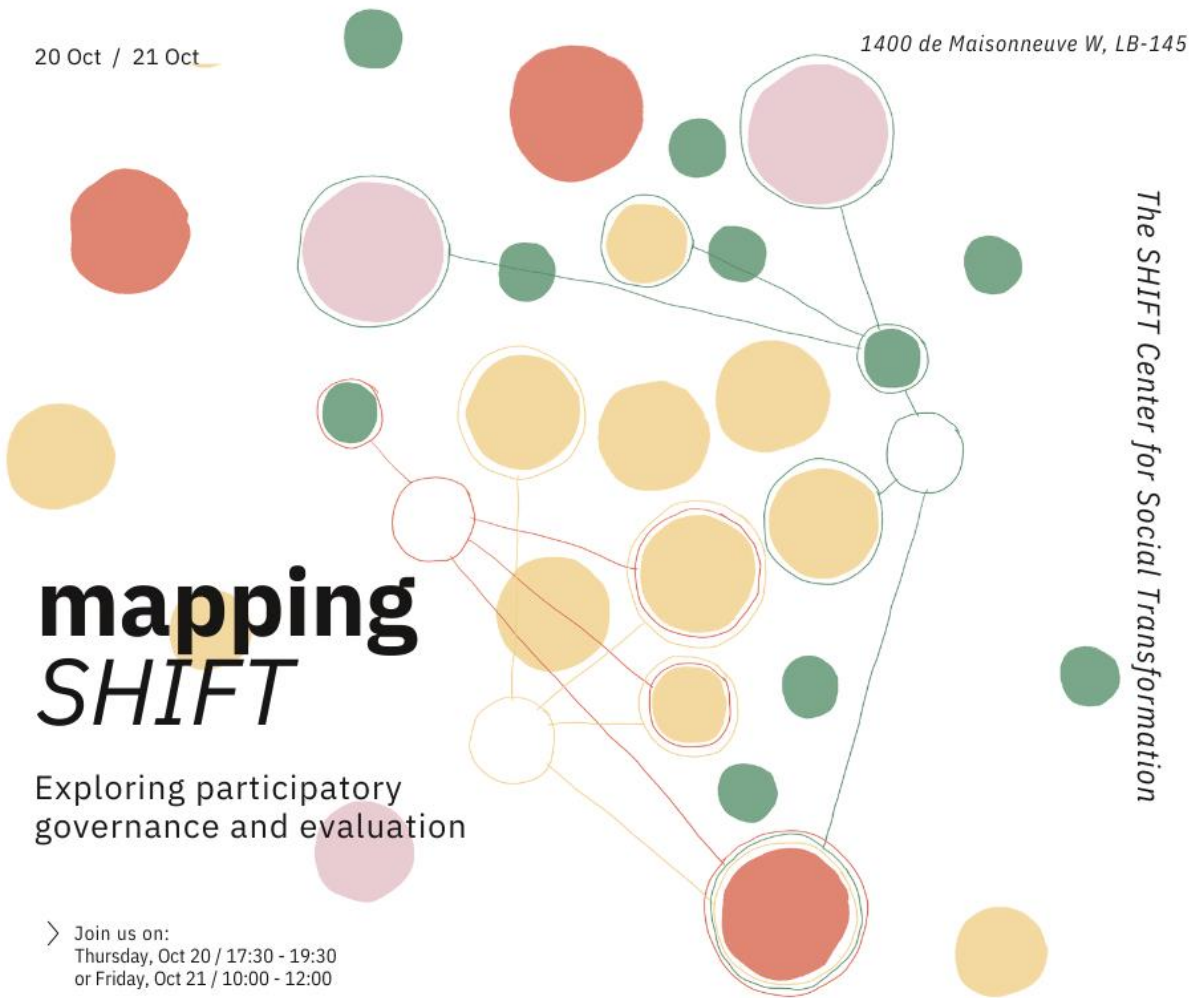


FIGURE 3 ENGLISH POSTER FOR THE MAPPING SHIFT EVENT

## FINDINGS

What follows is a brief description of the primary findings from the above analysis, which are further elaborated below in the Outcomes and Recommendations section, starting on page 20. As with all research findings, there are some generalizations provided here for consideration and action, the full nuance of the contributions of each member can be found in the maps themselves and may be revisited in future publications.

- Overall, the depictions of SHIFT and the conversations that came from the maps showed a favourable experience with and within the organization. Almost half of the participants used an abstract or ecological analogy to describe the organization (rather than a flow or organizational chart, as one might expect), and many of these were joyful expressions of the potential of the place.
- The most common elements on the maps from the Lynch framework are paths and nodes, which is hardly surprising as we asked participants to depict the flow of resources through the organization. That said, what was less common was the depiction of hard edges within the

organization, which could speak to the barriers being faced by members of the community; this is a positive absence. The most common depiction of edges or boundaries is between Concordia and SHIFT and/or Concordia and the broader Montreal community. Often too, the funder is depicted as “outside”, or separate from, SHIFT itself.

- As we started to review the maps, we noticed the regular absence of certain aspects of the organization. Most of the participants did not depict a structure as detailed as the theoretical governance model. Considering that many of the participants only interact with certain aspects of SHIFT and considering the impact of the confinement measures on people’s human interactions over most of SHIFT’s existence, this was not surprising. However, what was more surprising was the regularity with which important gaps we noted in the maps. Many of the elements from the theoretical model were absent in most of the maps generated by members. The most common missing elements were:
  - Learning Community
  - Program teams
  - Gov Hub
  - Funding hub
- There are interesting tensions that emerge, perhaps resulting from SHIFT being an organization whose strategic directions are set by hubs but operationalized by staff. In describing their drawings, participants often spoke with some confusion about who is making decisions in the organization. Specifically, there appears to be some confusion between the role of providing advice or guidance to staff, in contrast to the role of making decisions for staff to operationalize. In place of formalization in the process of decision-making, hubs and SC rely mostly on trust and faith that people can speak up if something is unclear.

## DISCUSSION

The purpose of organizational design is to provide a framework through which an organization might realize its vision and goals in a manner that is consistent with its aspirational culture. In the same way that city planning lays out infrastructure in service of building the kind of community laid out in a community plan, organizational design aims to articulate ideal pathways in terms of vertical and horizontal communication between different organizational components. Likewise, both organizational and city design can have the effect of making it easier or harder for people and resources to navigate the system they are hoping to optimize – sometimes in making it easier for one group, it becomes harder for another. Ideally, this only happens as needed and with intention. For example, in pursuit of a more vibrant neighbourhood, cities will sometimes make pedestrian- and cycling-only areas – this might feel inefficient to drivers, who have historically been privileged in terms of transportation infrastructure. In the same way that an efficient city for cars is rarely a pleasant place for people, an efficient organization for the executive arm may not be an *effective* place for community partners.

Increasingly, organizations seek to measure efficacy rather than efficiency, though this requires developing metrics for efficacy, and taking the time to measure and analyze the results. This project only takes the first steps in considering what some of those metrics might be, by trying to understand the current experience of community members concerning the theoretical governance model. This is the start of what could be a long conversation about the nature of governing the pursuit of social transformation processes from the grassroots. What follows are some recommendations developed in collaboration with the Gov Hub and conversations with community members in the time since this study was initiated.

## OUTCOMES

### MEMBERS LIKE SHIFT

It is worth reiterating that most participants had a favourable view of SHIFT and their experience being part of the community has been largely positive. While there wasn't a question related to satisfaction posed to participants, the vivid depictions and positive prose used to describe experiences in SHIFT were hard to miss in reviewing the discussions of the experience at SHIFT. This isn't the same as satisfaction, but positive affect is surely important when trying to engage people in an organization that is often not their primary place of employment. Noting any changes in this affect over time and the relationship to continued participation in the organization might be helpful as the organization matures.

Note, that it is also possible that members who felt less positively were unable or declined to participate in the exercise.

### SHIFT AS A “ROUNDAABOUT” ORGANIZATION

The notion of SHIFT as an organization made up of nodes rather than intersecting layers may help explain the organization to new members or outsiders. The two primary nodes are executive/strategic (SC) and operational (Staff). In the same way that a roundabout can appear to be a confusing mess the first time someone only familiar with intersections encounters it, this is a design that allows people and resources to flow at the speed of everyone's level of comfort. It behooves SHIFT to develop clear guidance for such an approach to bring up the comfort level and allow ideas and projects to flow accordingly. More on this below.

### ADVICE SEEKING OR DECISION-MAKING?

An important outcome of this process is the identification of the uncertainty around decision-making in the organization. As decision-making is central to power sharing, rectifying this experience of uncertainty should be addressed immediately. As decision-making is directed towards staff and staff are present at each hub, this should be a quick fix to make though consideration should be given to how different hubs may want to address this. More on this below.

### MISSING OR MISPLACED PIECES

While participants have a mostly positive view of the organization, it was also clear that the governance structure was not fully resolved or salient in the minds of many; this is somewhat concerning. After some discussion with the Gov Hub, we concluded that while it's acceptable that members from different hubs and committees will have different understandings of the governance of the organization based on the duration and nature of participation, we may wish to consider alternative means to communicate the structure when on-boarding participants into the organization in pursuit of greater clarity and transparency, especially with community members. If, as is the case, the people who currently wield the most decision-making power (i.e., SC members and Staff) are the only ones who understand resource flow, this may be an issue eventually.

We may wish to consider alternative means to communicate the structure when onboarding participants into the organization. Further, clarification around decision-making within hubs and committees will likely increase understanding between hubs.

### MAKING THE DESIGN MORE OBVIOUS

Despite how often the governance model is discussed at SHIFT, one very clear finding is that the entirety of the model is not sufficiently clear in the minds of many participants. It is acceptable for there to be a difference in the depth of understanding between veteran members vs. those who are new to the organization. However, to reduce potential frustration or confusion, and to deliver on the objective of sharing power, members need to understand how and why decisions relevant to them are made in different parts of the organization. Again, clarification around decision-making within hubs and committees will likely increase understanding between hubs. Additionally, added transparency around the governance model might also be helpful for the wider community.

Organizational charts are a common feature of good governance as they attempt to lay plain the lines of communication throughout an organization. When effectively drawn, they can help orient newcomers and outsiders to the parts of the organization that might not be immediately obvious from the outside. While SHIFT has a page dedicated to Governance on the website,<sup>7</sup> there is no depiction of this governance structure present and at the time of the Mapping SHIFT event, there were no visual depictions of the governance model in the space.

Alternatively, approximately 20% of participants used an ecological analogy (e.g., the water system) to describe their experience of governance at SHIFT, pointing to the salience of this approach to several participants in describing their experience of the organization.

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<sup>7</sup> See: <https://www.concordia.ca/about/shift/vision/governance.html>

From the discussions between members reviewed in this process, there is different language used to describe the same model. For example, it was not uncommon for participants to describe SHIFT as non-hierarchical, which is not completely accurate. By design, there is a cleave between strategic decision-making (SC) and operational decision-making (staff). This is a matter of efficiency in that it allows staff to take responsibility for the day-to-day operations of the organization with minimal micromanagement from other participants. At the same time, it allows *strategic* decisions to be influenced by those affected by the outcomes of those decisions via a system of delegates from the hubs to the SC. Decisions taken by one of the hubs, in theory, should not directly impact the strategic orientation of the work of another hub without first going through a process of deliberation at the SC, which can add a layer of deliberation that wouldn't be present in a truly non-hierarchical organization. This kind of check on influence is good practice but may need to be made clearer to participants who have not yet had the experience of being a delegate to the SC. Naturally, in practice, there is a reciprocal relationship between the various hubs and committees throughout the organization that happens via activities and relationships that develop through these activities.

### A NOTE ON TIMING

It is worth considering to what extent some of these findings were influenced by the time of this study. At the time of workshops, SHIFT was a largely virtual experience for many and it's fair to say that the opening of the campus location and new hubs (Space and Ecosystem Activation) may go a long way to addressing some of the gaps identified in this process by grounding SHIFT in a real place full of three-dimensional people. Live events might enable people to orient themselves more quickly with others in the organization and better understand the nature of resource flow in this relational manner. Moreover, the edges depicted between Concordia and SHIFT and/or Concordia and the broader Montreal community may become more porous with time in an activated, centrally located space.

### RECOMMENDATIONS

As noted above, as the researchers reviewed the maps and interviews and noted themes flowing from both the images and the discussions that followed, the Gov Hub was brought into the process and considered what this might mean for the organization in terms of the next steps. In turn, these ideas were presented for discussion to the SC. What follows are recommendations that emerged from this work.

**Develop one or more visual depictions of the organization's governance model and deploy it openly and widely.** In addition to a more conventional depiction (i.e., organizational chart), the ecosystem analogy was an intuitive way for several participants to describe SHIFT; this might be a more poetic way of explaining the system at work. Developing multiple, consistent approaches to communicating governance at SHIFT might help members better understand the model at work. Each of the models should include the same core parts, and these should include all the elements where a new member may see themselves participating in the organization. In pursuit of accessibility, strive for plain, non-jargon-laden language, with explainers as needed.

**Clarify processes used for decision-making.** In response to the confusion around decision-making and advice-seeking, hubs may wish to develop their models of proposal generation, decision-making, and conflict resolution as these are core elements of deliberative models of governance. Staff may want to start by proposing existing, proven approaches to this deliberative model to avoid confusion and/or paralysis around this issue.

**Impact evaluation is needed to answer the question of the governance model's value to SHIFT's work.** Making a judgment call in terms of whether this governance model is “working or not” requires an evaluation of SHIFT's impact concerning its objectives as an organization. This should be considered a separate exercise, outside of this governance evaluation. If SHIFT is struggling to meet its objectives, then we might investigate how the organizational model plays a part in this. That said, measuring the efficiency of a model in place of its efficacy is not advisable for a purpose-driven organization such as SHIFT.

An impact evaluation would include developing key metrics for success for the different components of the organization and how they may interact, to measure the performance of the whole of SHIFT. Good governance supports the effective delivery of the goals of the organization and probably shouldn't be treated separately from that. These metrics could be collected via or complement additional participative processes such as the one deployed for this report to increase shared learning between different aspects of the organization.

## FINAL THOUGHTS

This study, using cultural mapping as a tool to evaluate the experience of governance at SHIFT provided valuable insights into the experience of the mechanisms and processes related to governance and decision-making within the organization. By collecting and interpreting these mental maps of members of the organization using Lynch's schema, we can honour, recognize, and account for the individual experience of this place, while also recognizing the patterns that point to future work for the Gov Hub and other parts of the organization on improving people's orientation within SHIFT.

The deployment of this methodology not only captured valuable insights but also facilitated several meaningful group discussions among SHIFT members produced a beautiful set of documents that can form part of the archive of SHIFT's history and created opportunities for collective learning and understanding. Through these visual depictions and narrative descriptions of the organization, the cultural mapping methodology provided a unique tool for documenting the experience of dynamic approaches to governance within a larger bureaucracy. The end goal of the evaluation was to identify structures and processes that can support socially transformative efforts through the cultivation of a healthy organizational culture. Through the implementation of these recommendations and their retesting, we will be able to demonstrate the successful completion of this project.



# APPENDICES

## 1. CULTURAL MAPPING KIT

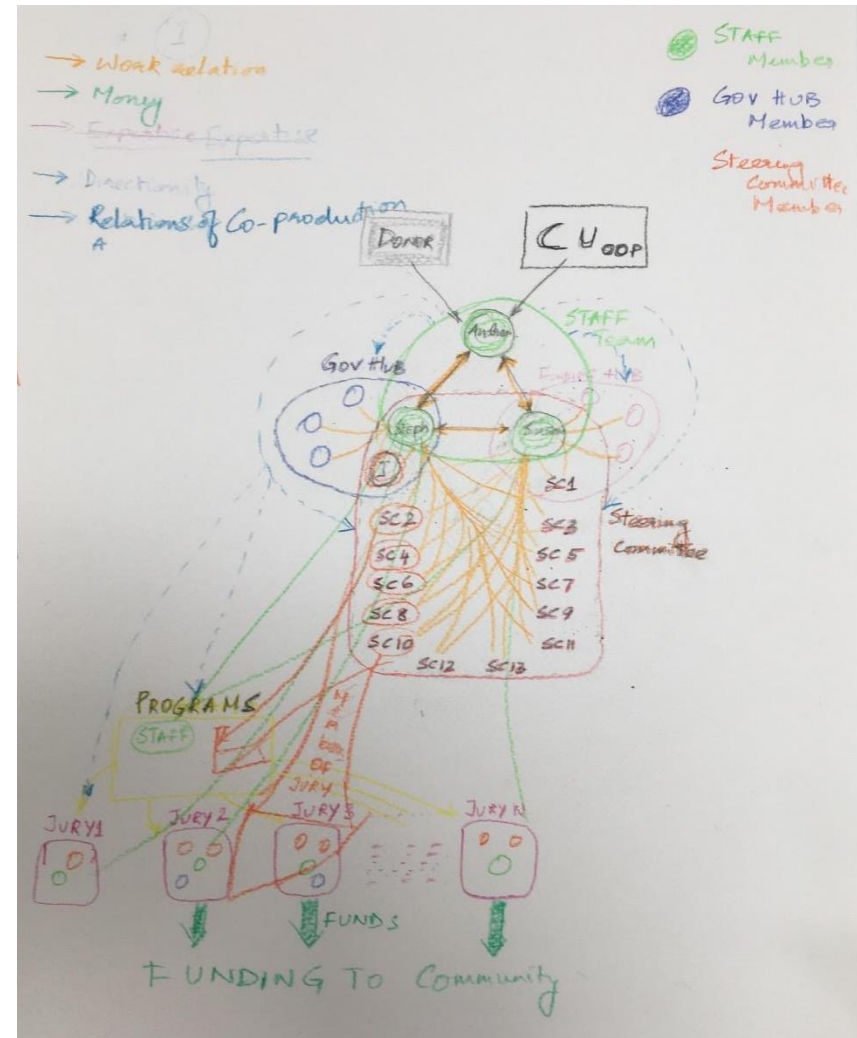
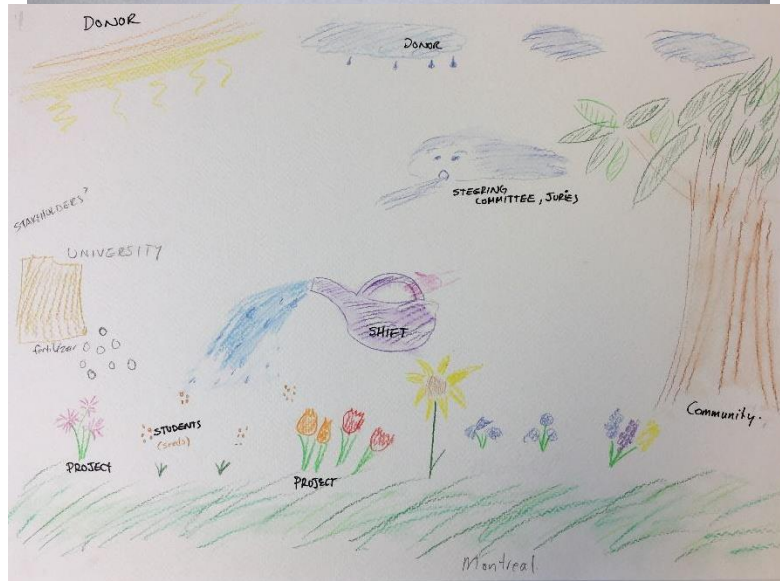
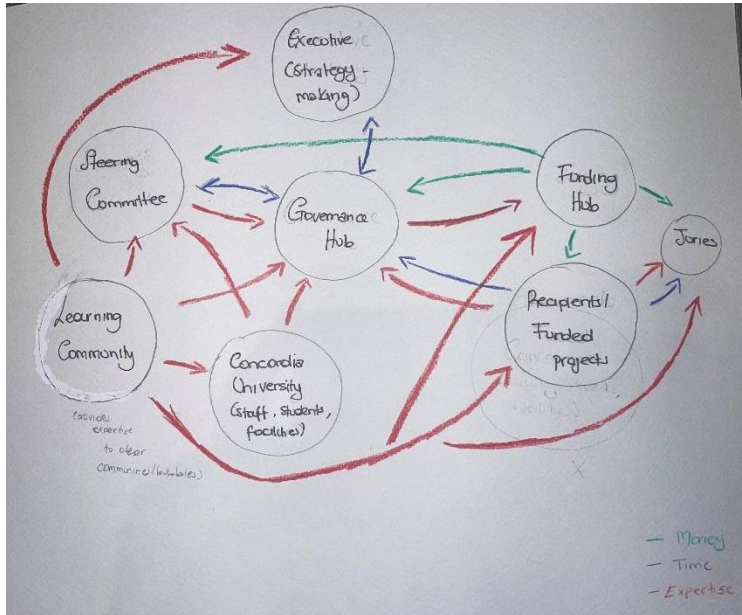
Materials provided by SHIFT:

- Printed information sheet and consent form.
- 11x14" 140lb watercolour paper + quarter page testing piece
- Watercolour pencil crayons
- Pencil
- Permanent fine tip marker (fine line Sharpie)
- Paintbrush x3
- Eraser
- Ruler




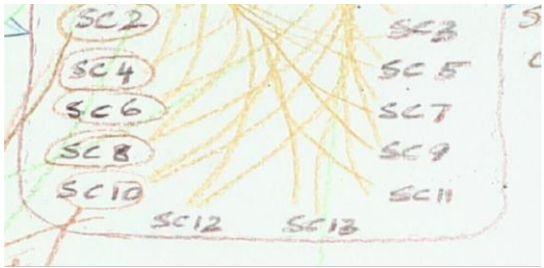


Participants are advised to have on hand:

- Paper towel
- Cup with water

## 2. EXAMPLES OF SHIFT MAPS



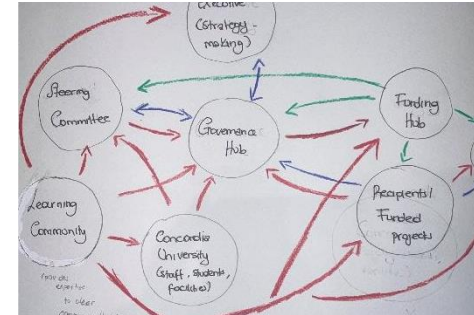
### 3. GUIDELINES FOR THE LYNCH FRAMEWORK

Lynch's framework	Guidelines for coding maps	Graphic examples found in the maps
 <p style="text-align: center;">PATH</p>	<p>Routes are taken as people engage in the organization. Look for the equivalent of paths, streets, sidewalks, or channels that enable the movement of people and/or resources like time and money.</p>	
 <p style="text-align: center;">DISTRICT</p>	<p>This is a space that would appear to be occupied by several of one kind of thing or person. In a city, a theatre district is a place you can go to knowing there will be theatres. In an organization, you might know that if you go to an R&amp;D lab you might find some engineers. In the maps, look for areas or experiences depicted that might be characterized by common characteristics, where people mentally enter "inside of," engage and thus feel a sense of belonging.</p>	
 <p style="text-align: center;">EDGE</p>	<p>Boundaries and breaks and impediments encountered during that journey. These are linear elements that are not path-like. They are often, but not always a boundary between two kinds of places. Look for barriers, sometimes permeable, which close one region or perspective or sense of belonging off from another; or see if you can identify seams, lines along which two areas of experience are related and joined together.</p>	



NODE

A node is a place where many paths cross or diverge for one reason or another. These are strategic focus points that might be embodied in the form of guides, mentors, and significant people. Look for the depiction of key pathfinders, and the use of names to label depictions of human figures or organizational components.



LANDMARK

These may be external points of orientation, achievement, or validation; they may be ceremonial. Landmarks may be, as Lynch describes key physical characteristics that can be distinguished as both unique and memorable; but in terms of a personal journey, they can also mark “rites of passage” and include personal plateaus, significant impacts, recognition received, social media notations, community acceptance or exclusion, public events, ceremonies, and so on.



*“So, this is Saputo, the cheese.... They are on a mountain of money. And so, my question was, ‘where does the money go?’ essentially.”  
03\_0104*