

## Case Study #5: Closing the Distance in Central West Ontario

### ***Closing the Distance for Seniors and Youth in Central West Ontario***

***A senior is sitting, reading a magazine, and in walks a young man. He says, "Hey, Grandpa, how are you? Can you lend me a couple of dollars for the movies?" Grandpa says, "Sure", and as he pulls some money out of his pocket, two condoms fall onto the floor.***

***Shocked, the youth says, "Grandpa, we need to talk. Don't you know about STDs and pregnancy?"***

***"Yeah, I know," replies Grandpa, "That's why I have condoms."***

***The young man warns him, "Well, you should not just keep them in your back pocket for a long time. They break down and wear out, and then they don't work properly."***

***"Well I wish someone had told me that earlier," says Grandpa, "I already have six kids."***

***(Skit performed in 'Dispelling Negative Stereotypes', a workshop for seniors and youth held on February 26, 2004 in Cambridge and North Dumfries)***

An audience ranging in age from 15 to 83 years old laughs heartily at this and other short performances by youth and seniors. They act out a series of skits that challenge myths and stereotypes about the attitudes and behaviour of young and elderly people in our society.

A local reporter captures the spirit of the daylong workshop in a story he titles, "Nothing like a little sex to bridge the generation gap". Referring to the skit about Grandpa and the young man, the reporter writes:

*"And when both teenagers and octogenarians in the audience of about 40 got their jokes, organizers knew the format had worked like a charm.*

*"We've had a lot of good laughs here", said the executive director of the social planning council of Cambridge and North Dumfries Township.*

*"It's kind of refreshing to see the gap isn't really as big as we thought."*

*"Staged by the council as part of an effort to help seniors and young people understand each other better, the workshop poked holes in perceptions on both sides of the age divide.*

*"In pairs, small groups and all together, participants discussed such preconceptions as youths are lazy, violent and promiscuous, while seniors are ill-tempered, unable to learn new skills and past caring about sex."*

*(The Record Kitchener-Cambridge-Waterloo,  
February 27, 2004)*

In other parts of the vast region of Central West Ontario, local social planning councils are also working with community leadership groups of youth and seniors to tackle

similar issues of shared concern. In Kitchener-Waterloo, youth and seniors have been meeting almost weekly since December 2003 to develop and test an “Information Access Audit Tool”, because they find that in a variety of different ways both seniors and youth are finding barriers to getting information they need to function and participate actively in community life.

In Brant-Haldimand-Norfolk Counties, the local social planning council is working with young leaders in the disability movement, who are advocating for engagement in community life beyond just concerns directly related to the needs of people with disabilities. “Shout-Out” sessions are being organized in the winter of 2004 for these young citizens to express their views and feelings on any number of community issues.

All three of the preceding initiatives are connected through the Central West *Closing the Distance* Project as part of the Social and Economic Inclusion Initiative. Almost two years earlier, the three social planning councils (SPCs) in Central West Ontario invited leaders from their respective communities to participate in a “roundtable” on social and economic inclusion. They discovered that the challenge of finding a shared focus and priority population for such a large regional project was huge. The three local SPCs that partnered as lead organizations for the Project covered a population of 597,175 spread over 2475 square kilometers in cities, towns and rural areas. In addition, a fourth partner in Elgin County under the leadership of the West Elgin Community Health Centre joined the *Closing the Distance* Project for part of the eighteen-month journey between 2002 and 2004. Meanwhile, the resources available to the regional Central West Project were the same as for the other *Closing the Distance* Projects in Sudbury, Thunder Bay, Kingston and Peel-Halton.

The Central West Project demanded a careful balance between regional coordination and local relevance. The particular complexity of the Central West initiative was anticipated early on, and so it proved to be. Other unanticipated diversions and complications also appeared in the path of Central West’s journey. In the end though, the participating communities were mobilizing young people and/or seniors to become actively engaged in community life on issues relevant to their shared needs and interests.

**Preparing for the Journey:**  
***Generating Wide Regional Interest***

***“There is a notion of pace. There is a contradiction between the slower pace that is needed to be inclusive and the timeframes for projects such as this. It takes time and energy for people and for organizations to be inclusive, to be responsive to those who are traditionally excluded.”***

**(Roundtable Discussion, Kitchener,  
February 27, 2002)**

***“How can we get people to think differently so that we actually attack the problem in a different way regardless of whether they live in urban or rural areas?”***

***“Our starting point is isolation and our focus is rural and urban areas.”***  
**(Central West Project Community Planning Meeting,  
September 18, 2002)**

In January 2002, the SPNO invites a group of community leaders in the Kitchener-Waterloo Region to come together into a Roundtable discussion on a Social and Economic Inclusion Initiative (SEII) being proposed by Health Canada (Ontario Region) for funding in 2002-04. The same invitation had been made to four other communities – Sudbury, Peel-Halton Region, Thunder Bay and Kingston, where there were strong local SPCs, which could take organizational leadership on the SEII.

Health Canada wanted to have geographic representation in its SEII, which meant some participation west of the Greater Toronto Area. Health Canada also wanted an established local organizational host for the SEII in all participating communities. In Central West Ontario, there were three possible local organizational hosts for the SEII – the Social Planning Council of Kitchener-Waterloo, the Social Planning Council of Cambridge and North Dumfries, and the Brant Community Social Planning Council.

At first, organizing a Roundtable in the Central West area does not seem to be a very different exercise than for the other communities invited to participate in the SEII Roundtables. Contacting the SPC of Kitchener-Waterloo to begin the process, the SPNO Consultant to Health Canada begins to realize the expansive scale of the exercise. The Executive Director of the K-W SPC contacts her counterparts in the SPC of Cambridge and North Dumfries and the Brant Community SPC as well as her own local networks in Kitchener-Waterloo to prepare a list of invitees to the Roundtable from the three areas.

### ***Surfacing Diversity in Urban-Rural Communities***

It becomes a very large list, although only thirteen community leaders from all three areas are able to attend the Roundtable at St. Andrew’s Presbyterian Church in Kitchener on February 27, 2002. The potential expansiveness of an SEII approach in Central West becomes clearer in the Roundtable discussion. As in the other SEII communities, there are many groups identified as being distanced and excluded from mainstream community life. As well though, the particular geographic features of the Central West area are highlighted. The region is a complex blend of both urban and rural communities. The disconnection between rural and urban communities is noted. At the same time, within each community a number of groups are identified as being isolated – single adults, single parents, low income people, seniors, disabled people, youth, newcomers without natural support networks, among others.

Thinking about inclusiveness in this context generates concerns among the participants about how effective a short-term Health Canada funded project can be. Roundtable participants clearly recognize that an inclusive approach requires time and careful development. They are worried about having that time and the resources needed to get anything done, especially given how hard it will be to create a clear focus for the project.

As the series of Roundtables across the province are completed and the SEII begins to take shape, the SPNO Consultant stays in touch with Central West through the Executive Director of the Kitchener-Waterloo SPC. Telephone and e-mail communications explore the potential for finding a Central West Project focus that combines the issue of isolation with the rural-urban nature of the area. The need for strong coordination and collaboration among the three SPCs in Central West is recognized as important. The SPNO Consultant advises a planning meeting of the three SPC Executive Directors before going back to the community in order to identify roles, responsibilities, and how the collaborative process will work.

### ***Exploring Themes for a Project***

Some concerns arise for the SPNO Consultant over the summer months. It does not prove possible to get all three Executive Directors together for this planning and clarification meeting. Also, the CAMBRIDGE-NORTH DUMFRIES SPC Executive Director is leaving her position to move out West, not to be replaced until mid-August. In mid-July, the SPNO Consultant learns that the Kitchener-Waterloo SPC and CAMBRIDGE-NORTH DUMFRIES SPC have had conflict about a joint project that had not been satisfactorily resolved, further complicating the need for SPC collaboration on the SEII.

Finally, since the SEII looks like it will be funded in the fall, another meeting in Central West is planned to make a formal invitation to the community to participate. Organized primarily by the Kitchener-Waterloo SPC, the meeting is scheduled for August 23. About twelve members of community organizations join the SPNO Consultant and the Executive Directors of the Kitchener-Waterloo and Cambridge-North Dumfries SPCs. After reviewing the requirements of the SEII to identify a focus and a priority population, several prospective issues or themes emerge for a project focus in this region:

- (a) Isolation. This issue definitely came up in February with respect to the experience of some rural populations, especially low-income families and seniors and people with disabilities. The point is made that a lot of people are moving to the urban areas because they cannot get the help they needed in rural communities.
- (b) Access. Recognized as not totally separate from isolation, this issue is discussed in relation to barriers that prevent some people from ready access to recreation services, health services and adequate housing, including some interest in how these barriers are the same or different for people living in rural and urban communities.

As a whole, participants feel it will be important to help people experiencing exclusion “*tell their own stories*”. The above themes might be used to focus a line of inquiry that will allow a “*deeper analysis*”. The SPNO can assist the “*story-telling*” process with facilitation support and the use of a graphic charting method, which helps people portray their stories in images and interpret the underlying dynamics and forces at work.

Although there is a feeling of progress in project definition at the meeting, concerns about the scale of the Central West Project geographically and the short eighteen-month time period of the SEII are raised again. Nevertheless, a meeting date is set for September 18 to make a final decision on the Central West Project's focus and to strike a community leadership team to work with the three SPCs in guiding the initiative.

Fourteen people including the Executive Directors of the Kitchener-Waterloo and Cambridge-North Dumfries SPCs meet on September 18. The Executive Director of the Brant Community SPC does not attend. The problem of defining a focus for a Central West Project is tackled again. Another part of the region declares its interest in participating in the SEII, through the Executive Director of the West Elgin Community Health Centre (CHC). Elgin County is west of the Kitchener-Waterloo area. There is no SPC in Elgin County, but the West Elgin CHC is already committed to a project focusing on the isolation of seniors in rural and urban communities.

Although no decision on a specific priority population is made at this meeting, there is agreement that the Central West Project will focus on isolation in rural and urban communities. It is decided that the priority populations will be defined as part of the process of developing the Project.

### **Phase 1 of the Journey:**

#### ***Struggling with Complexity and Collaboration***

***“The Central West Region includes Brant County, Waterloo Region and the areas to the west and north. Leaders who gathered to plan, care about the growing sense of isolation that is occurring for many people in the urban and rural areas. .***

***“. . . There are issues that face youth in many places, such as a public perception that teenagers who gather in groups are trouble, and media perceptions of gang youth leading to a general sense of fear, and young people are discouraged from gathering in public places, such as streets, parks, stores, malls, etc. . . .***

***“. . . In the later years of life people find themselves meeting ‘the system’ as health and finances decline. There is a growing fear of the ultimate ‘institutionalizing’ that can occur for elderly citizens. These fears can be based in the growing costs of quality health and home care, or the costs of nursing homes, and the loss of control that takes over as people come to depend on strangers for the most basic of care. . . . As resources and health decline, people experience the same exclusion that poor people and people with disabilities have always experienced.”***

**(Excerpts from Summary Narrative of Central West Community Visioning Day,  
December 4, 2002)**

Phase 1 of the SEII begins in October 2002. Each participating community has to identify a lead or host local SPC to receive Project funding. In Central West, since the Kitchener-Waterloo SPC has worked with the SPNO Consultant to take the lead in

planning and organizing to date, the SPNO Consultant, now SPNO's *Closing the Distance* Project Coordinator, designates the Kitchener-Waterloo SPC as the local host agency in the Central West Ontario Project.

The first steps are to develop job descriptions for recruiting Project staff and planning a Community Visioning Day. In October-November several staff are hired – a research/communications coordinator and a proposal writer, since one of the objectives of Phase 1 is to develop and submit a proposal for Phase 2 of the SEII. The Central West Project staff participates in the SPNO All-Region Orientation and Training session on the SEII in Burlington, Ontario on November 28-29, 2002.

All five SEII Project communities across Ontario are planning for their Community Visioning Days in November-December. The SPNO Project Coordinator is particularly concerned that the planning for the Community Visioning Day in Central West be well coordinated among the three SPCs. It is important that the SPCs present a united and consistent position on the Project and their respective roles in an event in which larger community participation is being engaged. For that reason, two SPNO facilitators go to Central West the day prior to the Community Visioning Day to hold a planning session with the three SPC Executive Directors and the Project staff.

Although at this meeting some tensions surface regarding coordination responsibilities, communications processes and how Project resources will be used, there is recognition that all three SPCs could build more effective working relationships as a result of the Project. Still, at this early Phase 1 stage, the Kitchener-Waterloo SPC is taking the Project leadership. Although participating in meetings and making input, the SPCs of Brant and Cambridge-North Dumfries have not yet made a formal commitment to the Central West Project.

### ***Identifying Seniors and Youth as Priority Populations***

The SPNO facilitators work with about 25 community participants on the Community Visioning Day in Kitchener on December 4. Captured on a wall-size mural, the discussion explores how many different groups are isolated in the region and the dynamics that increase this isolation. A rapidly increasing and more diverse population base, a changing economy, loss of stable families and communities, all are creating conditions of isolation and exclusion for certain groups. At the end of the day, participants agree that seniors and youth in both rural and urban communities in the region are the most affected and at-risk groups. Thus, the priority populations for the Central West *Closing the Distance* Project are identified.

In debriefing on the event the next day, there is a sense among Project staff and SPC leadership that progress had been made in defining the Project's focus. It is noted, however, that the community participants were more analytic than experiential in their discussion of the situation for seniors and youth in the region. None were actually young people or elderly themselves. It will be important to check out these perceptions directly with youth and seniors living in the region. Although priority populations have

been defined, there is still concern about the large-scale geography of the Project and how to manage the rural-urban dimensions of the Central West Project.

As in the other communities, Central West is pressed to develop a proposal for submission to Health Canada by mid-January. In development, the proposal is centring on building a “social inclusion capacity” in the region by creating a “factory studio/workshop” for the production of resources that local communities will use to identify exclusion and work toward inclusion. The SPNO Project Coordinator expresses concern that the Project’s work on community mobilization attend to discovering the actual experiences of isolation and social disconnectedness among seniors and youth as suggested by the Community Visioning Day, before presuming to know what resources are needed. He suggests reaching out to youth and seniors to explore what connections they have and don’t have, what connections they feel would be helpful to their active community participation. In that way, any “tools” produced for a “factory studio/workshop” would be grounded in the actual experience of the priority populations of concern.

### ***Proposing both Local and Regional Objectives and Outcomes***

There are also tensions between the Project staff and the Kitchener-Waterloo SPC Executive Director in developing the proposal. The final proposal is really produced by the Kitchener-Waterloo SPC, since the SPCs in Brant and Cambridge-North Dumfries do not make a final formal commitment as Project partners until the week before the proposal is to be sent in. The Executive Director of the Kitchener-Waterloo SPC does, however, solicit their input to the proposal.

When submitted in mid-January 2003, the Central West Project on “*Closing the Distance for Seniors and Youth in Central West Ontario*” proposes:

- *To gain a deeper understanding about the isolation and exclusion of youth and seniors in rural and urban areas in Central West Ontario by providing opportunities for youth and seniors to have a voice and tell their stories;*
- *To identify common concerns shared by youth and seniors in rural and urban settings;*
- *To mobilize youth and seniors in different Central West communities to identify issues they want to address and to work towards addressing these issues;*
- *To create tools and strategies for mobilization and addressing issues of concern; and*
- *To share these tools and strategies among communities in Central West.*

(Central West Project Proposal, Phase 2)

The Central West proposal identifies both regional and local outcomes in Phase 2:

*“A combination of local and regional processes in the Project will maximize shared knowledge and enable the creation of tools and resources useful for a range of communities.*

*“At the completion of this Project, the three Social Planning Councils providing collaborative leadership for this Project, will support at least one*

*Project in each of their local communities. Thus, the Project will engage, build capacity, develop new collaborative working structures, inspire local action and support continued action in the region to reduce barriers to inclusion.”*

## **(Central West Project Proposal, Phase 2)**

### ***Developing a Research Approach and Outreach to Partners***

The three SPC leaders, Project staff and SPNO Project Coordinator meet in late January to plan how to initiate the community mobilization process with youth and seniors. The proposal included holding a series of “kitchen table talks” and focus groups with seniors and youth in each local area. Three region-wide meetings are also in the proposal. The first of these is planned as a Community Partners Day to engage more community agencies in the initiative. Researching an “inventory” of existing tools and resources on social inclusion and developing a demographic profile and community indicators on social isolation is also part of the proposal, although the SPNO Project Coordinator expresses some skepticism about the value of too much of this kind of research to a community mobilization project.

The half-day Community Partner meeting is held on March 6 and does identify ways in which community agencies can participate in the *Closing the Distance* Project. Otherwise, although there is some thinking about how to reach out to youth and seniors with the Project, most activity in all three SPCs focuses for the February-March period more on the research and inventory development work.

### ***Emergence of Internal Issues and Tensions***

Two challenges arise in this period, however, that threaten the Project’s stability. First, in early February, the Executive Director of the West Elgin CHC expresses anger about Elgin County not being included in the Project proposal submitted to Health Canada for Phase 2. Within several days, however, he realizes that the geographic scope of the Central West Project is already huge and would be stretched beyond capacity if another region were to be included.

Still, West Elgin is interested in being involved and in providing its own resources to take a similar community mobilization approach with seniors and youth in Elgin County. There is agreement for West Elgin’s inclusion in the Central West Project in this way and SPNO agrees to provide resource support for West Elgin Project staff to participate in All-Region Workshops. Thus, West Elgin joins Project staff and SPC leadership at the All-Region REFLECTIONS Workshop held in Toronto at the end of March 2003.

More concerning, the Kitchener-Waterloo SPC Executive Director finds herself in serious conflict with her staff and Board of Directors over several issues that have been simmering for a number of months and finally boil over in March 2003. Since the Kitchener-Waterloo SPC is coordinating the Central West Project, the impact of threatened Board action may destabilize the Project and create problems with the funder.



The SPNO intervenes and assists the Executive Director in proposing an alternative approach, which the Board and staff accept. A lengthy and intense problem-solving process commences in April, which does not finally conclude until December 2003. Although successful in the end in resolving the Board-management issues, the process is a constant and energy draining distraction for the Kitchener-Waterloo SPC Executive Director as she attempts to fulfill her agency's responsibilities for coordination of the Central West Project.

### ***Tensions with SPNO Central Support***

Organization leaders and Project staff from Kitchener-Waterloo, Cambridge and North Dumfries, Brant-Haldimand and Elgin County, all attend the All-Region REFLECTIONS Workshop organized by SPNO Central Support in late March 2003. It is the largest group of all the SEII *Closing the Distance* Projects.

One of the SPNO facilitators who had worked with Central West at the Community Visioning Day is assigned facilitator for the group at this event. It is a very difficult assignment, as tensions among Central West Project participants are evident. The complexity of the venture proves frustrating: the size of the group, its rural-urban dimension, and the difficulties of both producing a coordinated regional outcome and locally relevant results in three, and even four communities. There is a feeling among the Central West participants that the structure and process of the All-Region Workshop does not serve the special conditions and complexities of their situation as well as it does the other Projects. They are also concerned that, despite the scale of the Central West Project, it is expected to produce results comparable to the other Projects with the same level of resources.

Nevertheless, the Central West Project enters Phase 2 of the SEII determined to produce tools and resources on social inclusion for youth and seniors from their collaboration at the regional level and to initiate local initiatives in each of their communities relevant to specific local interests.

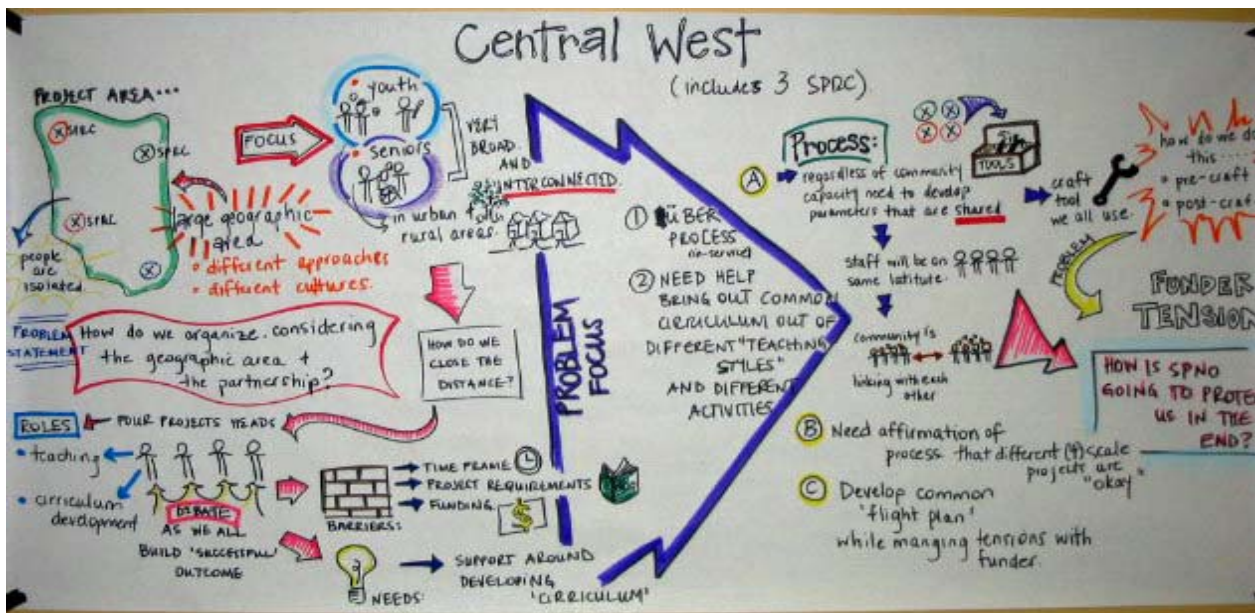


Melissa Kingdon, Project staff with Kitchener-Waterloo SPC,  
October 2002 – August 2003 before returning to university

**Phase 2 of the Journey:  
Balancing Local and Regional Activity**

**“We do need to figure out how to manage the particular geographic and organizational complexity of our Project in a way that balances local and regional needs. . . . How do we collaborate effectively to balance local approaches with regional learning?”**

**(From Central West Project’s Problem Statement framed for “Peer Problem Solving” Exercise at All-Region Design Studio, June 2003)**



Mural of Central West Project created at All-Region REFLECTIONS meeting in Waterloo, June 2003

Central West gets off to a good start in Phase 2 producing a brochure on its *Closing the Distance* Project for dissemination regionally and posting to its web site. The SPNO Project Coordinator shares the brochure with the other Projects and encourages them to use it as a model for their own local communications about their respective Projects.

Most of the early Phase 2 activity in Central West is organizing by the partners on how to work together. The proposal specifies that the funding will be shared equally among the three partners for local research and mobilization, with an additional amount going to Kitchener-Waterloo SPC to perform the coordinating function for the regional objectives of the Project. By the early summer, each of the three SPCs have hired their own Project staff.

Not part of the SEII funding, but wishing to stay connected to the *Closing the Distance* Project for shared learning, the West Elgin CHC uses its own resources to begin researching a community profile for Elgin County and reaching out to seniors and youth through kitchen table talks.



Roni Summers-Wickens on the SPNO Central Support Team facilitates a session with some of central West Project participants at a REFLECTIONS Workshop

Organizing themselves to work collaboratively and to manage complexity remains a pre-occupation in the spring of 2003. This is framed as a problem for the advice of Project participants from the other parts of Ontario at a “Peer Problem Solving” session at the SPNO’s All-Region REFLECTIONS Workshop in Waterloo in early June 2003. Some helpful advice is given to the Central West team, including:

- “narrowing the focus of each local project (perhaps youth and seniors in rural and urban areas was too broad for each local project) – at the end of the project, each local project will try to have one focused population;
- finding and clarifying common elements that tie all the local projects together – perhaps clarifying between all 4 partners what ‘closing the distance’ means, and finding common elements that each project will have;
- perhaps it is best to realize that the common elements and exactly how each project will look may not be clear yet – it may be best to get started with the field work and look at the research at the end to identify common elements and differences.

The SPNO Project Coordinator urges the last suggestion, in particular, since he is concerned that the researching of community profiles and resource inventories is delaying outreach and direct engagement of seniors and youth in the Project.





Sanchari Quader



Angela Pye



Andrew Terry

Cambridge-North Dumfries SPC research staff working on the Project

### ***Launching Kitchen Table Talks***

The three local SPCs begin their research on community profiles and resource inventories in the summer months. They also design a process for facilitating focus groups with seniors and youth in their respective communities and begin organizing these focus groups, called “kitchen table talks”.



Trudy Beaulne, Executive Director of the Social Planning Council of Kitchener-Waterloo, and Susan Gow, Central West Project Coordinator, Phase 2 at the All-Region REFLECTIONS meeting, June 2003

The kitchen table talks are mostly done through the summer and, except in Brant-Haldimand-Norfolk, where they will start in late fall. Planning meetings of the three SPCs report on progress in each area and concern about how to develop some regional

tools out of the local results. Central West leaders also express more frustration about the resources they have to do the job and other demands placed on them by SPNO Central Support, such as the need to get community participants to complete evaluation survey forms as part of the evaluation for the overall *Closing the Distance* Project.

By the end of October, 25 kitchen table talks involving about 150 seniors and youth have been conducted, 17 in Kitchener-Waterloo, six in Cambridge-North Dumfries, and two in Brant-Haldimand-Norfolk. The West Elgin CHC, starting earlier, holds nine table talks involving 75 seniors and youth in total. In September, West Elgin produces a report on its research and findings, titled *Social and Economic Inclusion Initiative: Closing the Distance in Elgin County*.

Although a lot of information about isolation and exclusion is being collected in Central West, the challenge of bringing it altogether into something coherent and useful at the regional level remains a concern. Also, Central West leaders are not sure how to move into local project definition and action. A further complicating factor is that the Executive Director of the Cambridge-North Dumfries SPC moves on to another job in September. Fortunately, this position is filled by mid-October by someone who has combined experience of professional work on community inclusion in the developmental disability field and voluntary leadership in community social planning in Cambridge and North Dumfries.



SPC Executive Directors at an All-Region Workshop: Caroline Ball, Brant SPC, Trudy Beaulne, Kitchener-Waterloo SPC and Lamine Diallo, Cambridge-North Dumfries SPC

### ***Re-Focusing at the Regional Level***

The workplan for Phase 2 calls for a Regional Workshop in the fall. The date is set for November 13, and planning begins with the participation of the SPNO Project Coordinator. The group re-commits itself to mobilizing community leadership on closing the distance in their respective communities and to developing regional resource aids on social inclusion for their own and others' use. By way of sharpening their regional resource objective, they aim to create a community workshop format and tools on closing the distance between children and youth from their own learning through the Project.

The Central West Regional Forum on November 13 is targeted as an opportunity to follow-up with seniors and youth that were engaged in the kitchen table talks. Beyond just reporting the results of the research, however, the session will be designed to identify what a community workshop and tools for social inclusion might look like. Also, local action that seniors and youth could work on in each of their communities will be identified.

Some creative ways to have workshop participants tell their own stories about inclusion and exclusion are discussed. It is decided that participants will be invited to create pictorial wall murals using images cut out of magazines and newspapers to tell their stories. There is some energy and enthusiasm generated around the planning of the Regional Forum.

### ***Continuing Tensions and Frustrations***

A little more than a week before the Central West Regional Forum, the third All-Region REFLECTIONS Workshop organized by SPNO Central Support is held in Mississauga. At this event, leaders from each local Project spend time with an SPNO facilitator mapping out the workplan for the last six months of Phase 2, which will conclude in the spring of 2004. The Central West leadership is committed to developing a local follow-up project in each of their communities and to contributing to a regional toolkit for a community workshop on closing the distance for seniors and youth that others could use. West Elgin CHC indicates that it feels it has both learned what it can and contributed what it can from its voluntary participation in the SEII, and will withdraw from ongoing direct involvement in the Central West Project after the November Forum is done.

Other tensions among the Central West leaders surface, however, during the course of the All-Region event in Mississauga. Concerns about Project coordination, about the distribution of resources among the three local areas, about certain partners not fulfilling their Project obligations, and about the role of SPNO Central Support in Central West, are raised. These issues are not really satisfactorily resolved before people return home, and the SPNO Project Coordinator is anxious about the impact these tensions will have on the upcoming Regional Forum in Central West.



Doug Graham, Executive Director of West Elgin Community Health Centre, emphasizes a point at an All-Region REFLECTIONS Workshop

### ***Successful Regional Event***

Internal Project tensions do not seem to affect the second Central West Regional Forum held in North Dumfries on November 13, 2003. Although the first snowstorm of the season hits, more than 60 seniors, youth and community workers from all the Central West communities involved in the SEII, including Elgin County, attend and participate enthusiastically for the whole day. Many of the forum participants have been participants in a kitchen table talk.

At the forum, findings from the kitchen table talks are presented, and participants discuss some of these findings in depth. Forum participants use magazine pictures, coloured markers and poster boards to create compelling pictures of what inclusion means to them. They work with people from their own local communities to identify issues they would like to work on at a local level. Many participants say they are interested in being involved in *Closing the Distance* projects in their own communities. The Central West Project partners remain committed to holding a third Regional Forum in the spring to bring together all the learning from their local community Projects.

In the months after the Regional Forum, each local Central West community works on its own local Project, developing its own leadership and focus for closing the distance between seniors and youth.

### ***Accessibility to Information in Kitchener-Waterloo***

In Kitchener-Waterloo, a “community planning group” is formed, made up of twelve seniors, young people and agency staff working with youth. This group meets on a weekly basis from December 2003 to April 2004 to develop and plan a local project and a community workshop. At first, community planning group members talk about the barriers they face to participating and being included in their community. They decide that they want to focus their local project on the barriers they experience when they try to access information. The group works together to identify some of the problems with

how information is provided, and what could make it more accessible. They also figure out who some of the important decision-makers are when it comes to providing information. Group members plan a community workshop, deciding what they would like to present and discuss, and whom to invite.

The Kitchener-Waterloo community workshop takes place in March 2004. The workshop is attended by the planning group, other seniors and youth from the community, and representatives from community organizations and government departments and services. These representatives all work for organizations that provide information to people in the community. They do work with immigrants and refugees, in education and health, for the public library, and for the city's public health department. Representatives from telephone, newspaper and television companies were also invited to the workshop, as they are also important providers of information. Unfortunately, none of these representatives show up, though one did register for the workshop.

In the workshop, seniors and youth tell the group about their personal experiences, discussing barriers they have to getting the information they need. Next, all of the workshop participants take part in a small-group activity, where they try to get information about a certain topic using the resources they have available. In this interactive activity, participants get first-hand experience with the difficulties many people have getting information, helping them to understand some of the barriers faced by seniors and youth. The group then talks about what they learned from this activity, and what they could do to make sure that information is easier to access.

Following the workshop, members of the community action group stay to evaluate the event and to hold their first "community action group" meeting. The community action group continues to meet every other week through March and April 2004. The group decides to do an "Information Access Audit" of organizations that provide information to people in the community. The group develops an "Information Access Audit Checklist Tool", which can be applied to different information sources to assess how accessible they are based on different criteria. The community action group also compiles a list of organizations that they think should be audited. This list includes the SPC of Kitchener-Waterloo, which runs the local community information centre. At the end of the project in April 2004, the local Kitchener-Waterloo project has completed its audit tool, and has begun to contact organizations that they hope to audit.

### ***Community Education on Negative Stereotypes in Cambridge-North Dumfries***

In Cambridge-North Dumfries, a group of seniors, youth and community workers from the November Community Forum come together again in December 2003 as the "community planning committee". The group talks about what issue they want to focus on in their local community. They unanimously decide that they want to help close the distance between seniors and young people at a one-on-one level. They also want to work on breaking down stereotypes about seniors and youth. The committee meets again in January 2004 to plan for their local community workshop, which will focus on these issues. They come up with ideas for how they would like this workshop to look.



The Cambridge-North Dumfries Project staff then develops and plans a community workshop based on the committee's ideas.



(TOP) Linda Terry, SPC of Cambridge and North Dumfries, (right) facilitates a community workshop on negative stereotypes, March 2004. (BELOW) Collage on negative stereotypes created by seniors and youth in Workshop.



In February 2004, the Cambridge-North Dumfries community workshop is held. About 20 seniors, 20 youth, community agency staff and the Mayor of Cambridge all come to participate in the event. Workshop participants talk about and analyze some of the

myths and stereotypes about seniors and youth that many people hold. Later, participants work in small groups to come up with creative performances and presentations to educate the group about a certain stereotype. The skits are full of fun and humour, and they challenge many of the false ideas that participants have about what seniors and youth think and how they act, like the idea that all young people are lazy, and that all seniors are cranky.

Many strong connections are made between young people and seniors at the workshop. At the end of the workshop, each participant writes down something they will do to help close the distance between seniors and youth. One young person says he will shovel the driveway for his senior neighbour. A senior plans to call her grandchildren and take them out for lunch. Another senior plans to contact a youth participant from the workshop to make plans for a get-together.

A local newspaper also covers the workshop, and publishes an article with a very positive commentary. This delivers an important message about negative stereotypes to the wider community, and helps to motivate workshop participants to continue to work on these issues.

Following the workshop, many seniors and young people who participated are excited about what they learned together, and want to continue to build connections with each other. Several seniors say that they would like to be involved in other activities with young people in their community. A group of youth from the workshop decides that they will organize something fun for some of the seniors living in their community. They plan a recreational activity at a local seniors' home, where residents participate in a role-playing game to solve a "murder mystery".

### ***Giving Voice and Getting Access in Brant and Norfolk-Haldimand Counties***

In Brant and Norfolk-Haldimand Counties, the local Project connects with a self-advocacy group of young adults with disabilities called "Voices Unlimited". Voices Unlimited is active in several communities in Brant and Norfolk-Haldimand Counties, holding regular meetings and participating in community forums like local All-Candidates' Meetings for the fall 2003 election. The group also holds "Shout-Outs", where group members talk about the barriers they face to participating in the community, including concerns related to the disabilities they experience and a wide variety of community issues.

The Brant Project connects with members of this group to plan and coordinate a community workshop. The workshop, called "Voice in Decision-making", happens in March 2003. About 60 people living with disabilities and community workers come to the workshop. The day begins with a panel discussion where three local decision-makers talk about how to have input into community decision-making. A young municipal politician, a local journalist and a municipal government staff person who works with community groups and organizations explain how they have had an impact on decision-making. They give advice and ideas about how to get involved, participate and have influence in local policy and decision-making.

The Central West Project has strong community participation from all its communities at the All-Region REFLECTIONS meeting in Toronto, March 22, 2004



Patti Gibson and Brad Campbell of Voices Unlimited with the Brant-Haldimand-Norfolk community group

Craig Needles and Mary Ann Milsap with Cambridge-North community group



Chris Douglas and Susan Gow with Kitchener-Waterloo group

Workshop participants then discuss some of the barriers they have experienced when they have tried to get involved in the community. They work in small groups to come up with changes they would like to see in their local communities, and ideas for how they could help make these changes happen. They talk about where they could start as individuals and as the Voices Unlimited group to make sure that some of their concerns are considered and addressed. At the end of the day, participants share the highlights of their group discussions. Although the group does not make any clear plans for what they want to do about the concerns they have discussed, many participants say they want to keep working to address the barriers they face to participating in their communities. The Brant SPC also makes a commitment to continue to work with Voices Unlimited on these issues.

### ***Regional and SPNO Connections***

Meanwhile, the Central West Project partners are planning their final Regional Forum. In early April 2004, 25 seniors, youth, community agency staff and Project staff from the Central West communities of Kitchener-Waterloo, Cambridge-North Dumfries and Brant-Norfolk-Haldimand attend this last Forum. Each local community Project presents their project activities, accomplishments and lessons learned to the regional group. Forum participants also discuss some of the common lessons that they have learned from their involvement in the local Projects. One of the key lessons that all the local Projects share is the importance of listening and being open to hearing new things from others.

The Central West partners prepare for the final All-Region Workshop and Provincial Conference in March 2004 in Toronto. The Central West Projects bring staff and participants from all of the local Projects. In total, 19 participants from Central West come to the March event in Toronto, again the largest delegation from any of the *Closing the Distance* Projects.

### **The Next Steps in The Journey: *Keeping the Local Momentum Going***

Although the April 2004 Regional Forum marks the end of the regional Central West Project, many of the local groups are committed to keeping their community initiatives going.

In Kitchener-Waterloo, the group has applied for some funding to continue their work on the Information Access Audit beyond April 2004. The community action group plans to continue its meetings and activities on access to community information. The group makes plans to train people who can work as auditors of those organizations that provide information to community members. The group also decides where it hopes to conduct audits once the process begins. It seems hopeful that the group will continue its work on this important issue through the summer of 2004 and beyond.

In Cambridge-North Dumfries, many participants from the community workshop want to stay involved in the project. This includes young people, seniors, and community workers who want to support this work. Project leaders from the SPC of Cambridge-North Dumfries are hopeful that work to close the distance between seniors and youth will continue in the community.

In Brant and Norfolk-Haldimand, the Brant SPC is committed to working on barriers to participation with Voices Unlimited beyond April 2004. Many young people with disabilities are also interested in continuing this work. The Brant SPC plans to organize another community workshop with Voices Unlimited in the spring of 2004, which will be held in Brantford.

It is clear that the community initiatives in Central West have created strong interest and momentum in their local areas. Local participants say they want to continue to work on these projects, and the local SPCs express interest in continuing to support them. It seems hopeful that this momentum will continue in some, if not all, of these local communities.

**Reflections on Closing the Distance between Seniors and Youth  
in Urban and Rural Communities in Central West Ontario:  
A Capacity-Building Analysis**

**Context for the Analysis**

There are several things that are important to the context of the Central West Project:

- This was the only Project in the SEII that involved three communities throughout the process, each community with a host organization responsible for leading local mobilization and contributing to regional outcomes. In addition, for most of the journey, Central West also had a fourth “unofficial” (i.e. not SEII funded) partner, Elgin County led by the West Elgin Community Health Centre. Again, this was a unique feature of the Central West Project.
- Although three of the local host organizations for the Project were members of the Social Planning Network of Ontario, they did not have strong and established working relationships among themselves. In fact, the Kitchener-Waterloo and Cambridge-North Dumfries SPCs actually had had a recent conflict on a joint project, which led to a breakdown in their working relationship. The SPNO Project Coordinator only discovered this when the SEII was about to be launched.
- Although the Project had both a local and a regional dimension to it and involved three funded host organizations, the funding resources available to Central West were no greater than for each of the other four SEII projects initiated and supported by the SPNO. The only resource advantage to Central West was that SPNO Central Support provided funding assistance for the participation of more Central West staff and volunteers at All-Region events, including support to leadership from Elgin County.

As a result of these features of the Central West Project, a good deal of the story has to do with how the participating host organizations developed working relationships that enabled them to plan and implement the Project in their respective communities. The journeys of their respective communities only starts to take shape in the last four-five months of the funded Project period. Therefore, much of the learning from the Central West Project results from the story of how the participating host organizations developed their capacity to work together on the Project.

The following chart gives an overview assessment applying Alan Kaplan's Capacity Analysis Framework to the Central West *Closing the Distance* Project.

Hierarchy of Elements that Build Capacity	Capacity Assessment of the Central West <i>Closing the Distance</i> Project
<p>1. <b><u>Conceptual Framework:</u></b> <i>The organization's understanding of its world (context).</i></p>	<p>The challenge of achieving conceptual clarity in Central West was complicated by bringing three host organizations together, as well as an "unofficial" partner from a fourth geographic area. Without a successful history of collaboration, they struggled to develop their working relationships in order to plan and conduct the <i>Closing the Distance</i> Project. Also, several of the host organizations experienced internal changes and issues that affected Project leadership and their capacity to carry a clear and consistent conceptual framework from their respective organizations into the collaboration.</p>
<p>2. <b><u>Organizational Attitude:</u></b> <i>Confidence and responsibility to act in its world rather than be a passive victim of external conditions.</i></p>	<p>The Central West partners expended much of their energy internally on their working relationships, rather than externally on the wider community until relatively late in the Project. They showed less clarity and confidence on mobilizing to achieve the Project's regional objectives than on locally relevant objectives. Unfortunately, these local community initiatives emerged only in the last six months of the Project.</p>
<p>3. <b><u>Vision, Strategy &amp; Culture:</u></b> <i>Sense of purpose and ability to plan, implement and adapt a course of action.</i></p>	<p>At the Project level, two conditions substituted for the lack of one organizational culture in shaping a vision and strategy: (1) a shared commitment to the values of independent, community-based social planning; and (2) a commitment to "social inclusion" as a central social planning value. There was clarity about what "closing the distance" meant among the Project leadership (supporting interconnectedness over distance and isolation). There was recognition of "distancing" between youth and seniors and between urban and rural experiences. But, the project partners struggled to create a coherent vision that would encompass <i>both</i> dimensions. A shared vision really started to take shape in each community only when youth and seniors were engaged directly. Clarity of vision on the urban-rural dimension never really occurred.</p>

<p><b>4. <u>Structures and Procedures:</u></b> <i>Organized and operationalized in a way that enables fulfilment of purpose, realization of vision, and effectiveness of strategy.</i></p>	<p>The pre-occupation with the definition of the Central West Project as a whole placed pressure on regional coordination early on, which essentially meant the Executive Directors of the three SPCs and the West Elgin CHC became the Steering Committee with periodic SPNO Central Support assistance. Project management was consumed with working relationships and coordination of efforts. The development of local leadership structures to support community mobilization occurred late in the Project after youth and seniors were engaged directly at the community level to work on locally relevant inclusion issues.</p>
<p><b>5. <u>Skills and Competencies:</u></b> <i>Leadership and staff relevant and appropriate to the organization's mission and work.</i></p>	<p>Taking a more gradual, linear, rational planning approach, the Central West partners hired and employed the appropriate Project staff for researching community profiles and organizing and conducting kitchen table talks. Kitchener-Waterloo employed staff with strong planning and coordination skills in Phase 2. The community mobilization skills among Project leaders and staff showed up more when following up with groups of youth and seniors at the community level in the last four months of the Project.</p>
<p><b>6. <u>Resources:</u></b> <i>Financial means and physical assets.</i></p>	<p>Although involving three local host organizations in a large geographic region, Central West was funded at the same level as the other four local SEII projects (only the Peel-Halton Project also involved more than one organizational host). This became an issue of equity with the Project partners and presented challenges with respect to both allocation of existing resources and developing effective strategies for sustainability.</p>



## Conceptual Framework

### **Summary:**

**In Kaplan's Capacity Assessment framework, it is important that members of the organization share the conceptual framework. The challenge of achieving conceptual clarity in Central West was complicated by bringing three host organizations together, as well as an "unofficial" partner from a fourth geographic area. Without a successful history of collaboration, they struggled to develop their working relationships in order to plan and conduct the *Closing the Distance* Project. Also, several of the host organizations experienced internal changes and issues that affected Project leadership and their capacity to carry a consistent conceptual framework from their respective organizations into the collaboration.**

### **Discussion:**

The scale of the Central West Project was huge. It involved three geographic areas, four including Elgin County, when West Elgin Community Health Centre committed to participate, although not funded under the SEII. Each of the four areas had both urban and rural communities and the Project "focus" attempted to encompass both with respect to isolation and connectedness for seniors and youth. As it was, the host organizations were not exactly clear on how they exercised their mandates in relation to their respective rural communities. It was much too ambitious to assume that the *Closing the Distance* Project with its limited time and resources could help define how these organizations could work with rural communities.

The invitation to the partners in Central West was made on the basis of geography rather than evidence of a strong network of community organizations with established collaborative working relationships. In the spirit of inclusiveness, the Roundtable process and proposal development process were left open for wide geographic participation. Under SPNO Central Support's guidance, the SEII allowed the presence of three host organizations and their relative regional proximity to determine the structure of the Central West Project. The absence of strong working relationships and the lack of a history with joint projects were not serious considerations in the decision to encourage a regional collaboration. In fact, it was discovered in the pre-launch period that the Kitchener-Waterloo and Cambridge-North Dumfries SPCs had experienced unresolved conflict in a previous joint project. This would suggest different views of community planning and development, which Kaplan would argue should be an alert to problems with collaboration between these organizations.

Again, concerns about being inclusive and open led to accepting Elgin County as a fourth community in the Project, even though not funded directly through the SEII. No previous working relationships existed with this community or its lead organization, the West Elgin CHC. Tensions did arise at several points between West Elgin CHC and one or two of the other partners. Although it followed the

same community research and outreach process, and even completed this work earlier than its partners, West Elgin did withdraw from participation at the regional level in the Central West Project late in 2003.

While raising the lack of a collaborative history among the local partners as a major weakness with respect to a shared conceptual framework, it is important to note that in interviews near the end of the funded Project, the Executive Directors of the three local SPCs indicated that working in collaboration had been one of their Project achievements. Perhaps, what may have been unwise to initiate in terms of probability of Project success proved to be beneficial in terms of organizational relationships.

Coherence or at least compatibility of conceptual framework among so many collaborating partners was a high enough expectation, but there was also evidence of internal issues within several of the partner organizations. In fact, a good part of the Kitchener-Waterloo SPC's struggle among Board, management and staff had to do with different understandings of the role of social planning in the community. The K-W SPC had come through a crisis period with core funders in the 1990s and was attempting to integrate more effectively its two primary functions – social planning and community information services. The mediation process to resolve the internal conflict surfaced this issue as one requiring organizational attention. Not only was this distracting to K-W leadership and staff in the *Closing the Distance* Project, but it also weakened the contribution that the K-W SPC could make to the clarity of the conceptual framework for the collaborative effort.

The SPC of Cambridge and North Dumfries also experienced a lot of internal transition during the course of the Central West Project. The Executive Director who was involved in the Roundtable process moved out of the community before it started. Her replacement was new to the organization, to the community and to social planning. Although he engaged in the Project enthusiastically, other organizational distractions such as maintaining funding relationships consumed a lot of his attention. When another employment opportunity presented itself, he moved on to it.

Fortunately, the third Executive Director for the Cambridge-North Dumfries had volunteer experience with the organization, was familiar with social planning and was experienced with the concept and practice of inclusion from her professional work in the disability field. By the time of her appointment, however, there were only seven months remaining in Phase 2 of the SEII. Therefore, Cambridge-North Dumfries' contribution to a shared conceptual framework for the collaborative effort was impaired by changes in its executive leadership.

Finally, the Brant Community SPC's participation in the Central West Project was less consistent than the other partners. There were clear differences of view between the Brant SPC and the K-W SPC on the coordination function for the

Central West Project. As well, tensions and occasional conflicts between the Executive Director of the Brant SPC and the SPNO Project Coordinator also presented some challenges. In many ways, these tensions reflected different, if not competing, conceptualizations about the practice of social planning in the community.

Applying Kaplan's capacity assessment framework to the Central West Project, it is clear that there were danger signals on the important first element of conceptual clarity and consistency. There was no evidence that this existed among the organizational partners prior to the Project. The conditions for a successful collaboration did not exist. Rather, these critical success factors were foregone for the sake of "inclusiveness". Actually, the decision to proceed with a multi-partner initiative under these conditions in a huge geographic region may have increased risk factors for failure.

Clearly, it is not wise to assume that inclusiveness is an absolute value. Sometimes, hard choices may have to be made that limit inclusiveness legitimately for the sake of effectiveness and efficient use of resources. In the case of Central West, in the absence of a demonstrated history of effective collaboration among so many partners, simplifying the organizational base and geographic scope of the Project would have been advisable. This would have meant making a choice for the Project to be developed and implemented in *one* of the three-four communities involved.

How is such a choice to be made within a provincial network of organizations (the SPNO) where all organizational members have an interest in work on social inclusion? Would not picking one community in a region with three-four prospects be arbitrary and non-inclusive? This, of course, would depend on the method of selection. If a process is designed in which all prospective partners develop and apply criteria for selection together, then both arbitrariness and non-inclusiveness are avoided. The SPNO has learned that it must develop and test a "peer selection" process for just such future choices for its members and other communities faced with difficult decisions. The SPNO proposed a "peer selection" process for the next phase of SEII funding, since Health Canada has indicated only limited resources are available to continue the SEII, and only some of the previously funded projects can be chosen for continuing support.

### **Organizational Attitude**

#### **Summary:**

**The Central West partners expended much of their energy internally on their working relationships, rather than externally on the wider community until relatively late in the Project. They showed less clarity and confidence on mobilizing to achieve the Project's regional objectives than on locally relevant objectives. Unfortunately, these local community initiatives emerged only in the last six months of the Project.**

**Discussion:**

Not surprisingly for a forced collaboration, there was a lot of uncertainty about the regional dimension of the Central West Project among the host organizations. This contrasted sharply with the last six months of the Project, when each of the partners was working with local leadership on issues relevant to seniors and youth in their respective communities.

The structure of the SEII focused the Central West partners to plan regionally rather than locally from the outset. The Roundtable sessions and the follow-up session were conducted at the regional level (i.e. participants from all four communities invited to a common meeting to develop the Project). The Community Visioning Day to launch the initiative late in 2002 was organized and conducted at the regional level. The Phase 2 proposal was shaped regionally with all three SPCs making input to a process that was managed regionally through K-W SPC Project staff and the SPNO Central Support team.

As a result, much of the energy of the Project leadership was focused on developing their working relationships and on defining a community mobilization process. In fact, community mobilization was much delayed because of this regional emphasis. It was not until the Regional Forum in November 23 that real community mobilization began. Prior to that event, the three SPCs adopted a more traditional community research approach, preparing community profiles and compiling resource inventories on isolation among seniors and youth in their areas. The SPNO Project Coordinator expressed some frustration with the delay in reaching out to engage seniors and youth directly on the issues. It seems clear now, however, that adopting a more cautious research approach to the task was “safe” in light of the uncertainty about the regional dimension of the Project.

When the SPCs did start organizing and conducting kitchen table talks for seniors and youth, the process in each community appeared to be focused primarily on eliciting information and experience from them. While legitimate and important for the Project, there were no clear strategies or plans for mobilizing the people reached in this way, except in Kitchener-Waterloo where continued communication with project participants was a key feature in the local engagement. Indeed, the first time that all kitchen table talk participants were invited to a follow-up session was the Regional Forum in November with only six months left in Phase 2.

There were a number of ways that the Central West Project partners expressed their frustrations about the regional dimension of their Project. At meetings with the SPNO Project Coordinator, they complained about inequitable distribution of funding, since their Project had both regional and local outcomes to meet. They felt that the All-Region meetings were not structured suitably for support to both their local and regional objectives. There were also differences of view expressed within the collaboration about how regional coordination should be

managed. For its part, burdened with Project coordination responsibilities, the Kitchener-Waterloo SPC felt impeded in its ability to reach out to and engage its own community in the Project. In general, the organizational partners approached the regional dimension of the Central West Project more as an obligation of the SEII than as a regional commitment, which was reflected in the relatively weak regional outcomes. This might have been expected in such a forced partnership.

When a local focus emerged for each community out of the November Forum, the Project partners exhibited a much greater sense of certainty and confidence about how to act and follow-up in their respective communities. All three local SPCs left the November Forum in which youth and seniors had directly participated with commitments to work with their respective community leadership groups on locally relevant action to close the distance. All Project partners demonstrated a strong sense of how to build on this local momentum. Unfortunately, by this time only three to four months of funded Project activity remained.

The sense of capacity to act locally in the Central West Project versus the uncertainty about how to pursue regional objectives adds weight to the wisdom of supporting one local organization rather than engaging three local communities in a regional project, as suggested in the previous section. Does this mean that regional initiatives are out of the question? Again, the issue may be clarity on the conditions under which to undertake a regional project. First, if it involves a collaborative partnership, the considerations regarding the clarity of conceptual framework among the partners is primary. Have they established proven organizational working relationships that have demonstrated a shared view of their role and function in the environments in which they operate? If so, secondly, are the resources adequate and time frames realistic for the achievement of both local and regional objectives? Thirdly, if there is still uncertainty about the regional dimension of the initiative, does the option exist for developing regional results from the ground up?

It is possible to imagine that the Central West partners could have been supported to engage their senior and youth communities separately on issues of inclusions (e.g. three-four Community Visioning Days). Local “closing the distance” initiatives might have emerged initially from each of the communities and been brought forward to a regional forum in order to discuss and discover regional implications and learnings. In this approach, each local organizational partner would at least be starting with a sense of confidence about its capacity in its own community. Using its own community’s experience with the concept of inclusion, each partner might then have been positioned more confidently to contribute to a discussion of regional possibilities with its counterparts.

In a way, this approach would be consistent with the SPNO process of supporting five local projects across the Ontario and creating periodic

opportunities at All-Region events to bring them together for shared problem solving and learning. Supporting each local community directly rather than through regional coordination would require more resources and perhaps more time. According to Kaplan, success locally would still depend on the strength and clarity of conceptual framework of each organization in its own community. At the regional level, success would probably still require the local partners to develop some shared understanding of regional context, if they hoped to translate their local experiences and learnings into something beneficial regionally.

## **Vision, Strategy and Culture**

### **Summary:**

**At the Project level in Central West, two conditions substituted for the lack of one organizational culture in shaping a vision and strategy: (1) a shared commitment to the values of independent, community-based social planning; and (2) a commitment to “social inclusion” as a central value of social planning. Therefore, the SEII Project became the joining point for framing a shared vision and strategy among the three (four) organizational partners in Central West. There was clarity about what “closing the distance” meant among the Project leadership (supporting interconnectedness over distance and isolation). There was recognition of “distancing” between youth and seniors and between urban and rural experiences. But, the Project partners struggled to create a coherent vision that would encompass *both* dimensions (youth-seniors; rural-urban). A shared vision really did not start to take shape until they connected with youth and seniors directly, which then led to clarity of vision particular to each of the three local communities and more specifically with the youth-senior dimension than the rural-urban dimension.**

### **Discussion:**

The Roundtable and Community Visioning process in Central West identified isolation and disconnectedness among seniors and youth as a focus for the Project. Given the geographic breadth of participation in these processes, it was not surprising that both rural and urban perspectives emerged, which resulted in framing the focus as isolation and disconnectedness for seniors and youth in urban and rural communities. Thus, even the decision on a priority population introduced more complexity into the Central West Project than most other projects experienced.

There was an intuitive sense among the Project leadership about what the distancing issues were for seniors and youth in rural and urban communities in the region. The Community Visioning Day offered some interesting insights and analysis about the demographic, economic, social and cultural dynamics at play in the region and the probable implications in the lives of seniors and youth.

Although no seniors or youth participated directly in the event, the community leaders present seemed to have an acute appreciation for the “distancing” factors or barriers to inclusion that existed in the lives of seniors and youth in the region. Interestingly, the Community Visioning Day never really got beyond the description of existing conditions in the regions and an analytic perspective to frame a vision of inclusion for seniors and youth. There is no mural portraying a vision of inclusion for seniors and youth in Central West, as there are for the other local *Closing the Distance* Project communities. At the end of the central West Community Visioning Day, even the descriptive and analytic perspectives of the participants still required validation through engagement directly with seniors and youth.

It took a while for this validation to occur. As explained earlier, one reason was the energy required to develop working relationships among the Project partners. Defining and committing to a common process in order to contribute to regional outcomes produced a more cautious, linear, rational planning strategy starting with data collection on the status quo (community profiles and resource inventories). Even the kitchen table talks that reached out to seniors and youth took more of a research than a mobilization approach.

In the end, none of this helped to shape a regional vision for the Project. Visions framing what needed to change to close the distance for the identified priority populations started to take shape only when local seniors and youth became engaged on issues relevant to their own particular communities after the Regional Forum in November 2003. Only at the community level could a sense of purpose for “closing the distance” on specific issues be found.

A regional vision has still not been framed for Central West. Clearly, the presumptions that a shared philosophy of community practice and a common commitment to social inclusion would be sufficient conditions for a group of social planning bodies to shape and pursue a regional vision did not hold true. These more general and abstract values and principles were trumped by the structural faults in the collaborative partnership and the geographic scope of the Project identified earlier.

The question remains, however, whether it is unrealistic to imagine that collaborative initiatives can create compelling regional visions and coherent strategies to pursue them. As suggested in the previous section, more support to each local community for immediate follow-up to the Community Visioning Day and direct engagement with youth and seniors earlier might have made a difference in generating a regional vision and strategy for the Project. Under the conditions in Central West, a regional vision might have been created in a more natural and evolutionary way from the ground up.

## **Structures and Procedures**

### **Summary:**

**The pre-occupation with the definition of the Central West Project as a whole placed pressure on regional coordination early on, which essentially meant the Executive Directors of the three SPCs and the West Elgin CHC became the Steering Committee with periodic SPNO Central Support assistance. Project management was consumed with working relationships and coordination of efforts. The development of local leadership structures to support community mobilization occurred late in the Project after youth and seniors were engaged directly at the community level to work on locally relevant inclusion issues.**

### **Discussion:**

The proposed model for the *Closing the Distance* Projects in the SEII was for the local SPC to serve as a lead organization for a broader community leadership group that would guide the local initiative. All five Projects followed this approach with more or less success in terms of the breadth and strength of participation beyond the local SPC.

The experience in Central West is particularly illustrative of its complexity as a regional initiative. The Central West partners attempted to mobilize a broader Project leadership group at a Community Partners Day held on March 6, 2003. The Central West partners presented a framework for the participation of other community agencies in the Project. Additional community agency leaders were identified at this event to become part of the Central West Project Steering Committee. This broader Project Steering Committee, however, was never really convened to guide the Project. Project planning and implementation stayed in the hands of three SPCs and West Elgin CHC, indicating the need to continue to work on their own relationships and coordination within the Project before opening it up. It never did get opened up to broader regional level Project leadership.

The Project became consumed with the coordination issue, which surfaced tensions among the partners about how coordination was being managed, how funding was being allocated, and how different partners were not fulfilling their responsibilities. Issues were raised with SPNO Central Support about the lack of appreciation for Central West's unique status as a regional initiative, requiring different forms of support and more funding. Again, the geographic scale of the Project with the expectations of regional outcomes had directed the structures and procedures of Project management inward on working relationship with each other rather than outward on realization of a clear Project vision, thus failing the test on the fourth element of Kaplan's Capacity Framework.



Notably, when the focus for each participating community became local, the individual SPCs did recruit and support local leadership groups of seniors, youth and other community members to plan and guide local developments as envisioned in the original model for the SEII. Action at this level was more concrete, specific and relevant than at the regional level, and the local SPCs were more confident and certain about their roles. They could support local leadership to apply their vision of inclusion to community issues rather than be pre-occupied with Project management.

Regarding regional initiatives, can effective coordination mechanisms be set up for fulfillment of Project purposes? Again, assuming the previous elements in Kaplan's Capacity-building Framework are strong, it is possible to imagine an effective collaborative designing its own structures and procedures for coordination. While the Central West partners did not have the experience and history with each other to have done this within the period of the SEII, the way that coordination was arranged did not help the situation. Essentially, the terms of SEII funding required one local lead organization to assume financial accountability and legal responsibility for the funding. Based on previous working relationships and familiarity with local operations, SPNO Project Coordinator asked the Kitchener-Waterloo SPC to assume this role from the outset (The K-W SPC had been involved in a previous SPNO project on social capital formation). There was no serious attempt made for the three local SPCs to make this decision themselves.

### **Skills and Competencies**

#### **Summary:**

**Taking a more gradual, linear, rational planning approach, the Central West partners hired and employed the appropriate Project staff for researching community profiles and organizing and conducting kitchen table talks. Kitchener-Waterloo employed staff with strong planning and coordination skills in Phase 2. The community mobilization skills among Project leaders and staff showed up more when following up with groups of youth and seniors at the community level in the last four months of the Project.**

#### **Discussion:**

There were two important levels of Project staffing in Central West: (1) the Project management level, which were the Executive Directors of the local host SPCs; and (2) the Project research and community engagement level, which included added Project coordination responsibilities assigned to Kitchener-Waterloo staff.

The Executive Directors were all experienced professionals, all having extensive experience in community work (only one, the second Executive Director at the Cambridge-North Dumfries SPC without previous experience in the social planning field). If the problems of effective collaborative work and coordination of

effort could be resolved just by having skilled and experienced senior Project management, there is no reason to believe that the Central West partners were not positioned to do so. The difficulties in Central West at the regional coordination level noted previously suggest that Kaplan's hierarchy of key capacity-building elements applies – skilled staff is fifth in the hierarchy.

The Central West partners also hired or assigned competent research staff to carry out the fairly standard social planning research tasks of creating community profiles and resource inventories and organizing, conducting, and documenting the kitchen table talks (focus group work). Although the Project outreach workers were generally younger (university student age), they would not be identified directly with the youth and/or seniors who were engaged in the table talks. This did not appear to be a barrier to encouraging senior and youth participation and the Project staff performed this outreach task well. The K-W Project staff responsible for coordinating Project activities also performed this role admirably (e.g. primary responsibility for organizing the Regional Forum in November 2003).

The Central West partners were also able to re-direct both their senior managers and Project field staff to the local community mobilization process following the November Forum. Their leadership recruitment and development skills were evident at the All-Region REFLECTIONS session in Toronto in late March 2004, when all three communities were represented by local youth, seniors, and people with disabilities, who took an active role in presenting on their respective local inclusion initiatives.

### **Material Resources**

#### **Summary:**

**Although involving three local host organizations in a large geographic region, Central West was funded at the same level as the other four local SEII projects (only the Peel-Halton Project also involved more than one organizational host). This became an issue of equity with the Project partners and presented challenges with respect to both allocation of existing resources and developing effective strategies for sustainability.**

#### **Discussion:**

The complexity and large scale of the Central West Project in comparison to the other local SEII projects was evident from the outset. Only the Peel-Halton Project involved a partnership of more than one organizational host, and it was fairly tightly defined in terms of priority population and projected outcomes. Central West had a dually defined priority population – seniors and youth – in contrasting living environments -- rural and urban communities – and engaged three funded partners and one associate partner (West Elgin CHC). The Central West Project's proposal identified both local and regional objectives and outcomes.

The funds available to each local SEII Project, however, were the same. This inequity was noted early by the Central West partners and was repeated often. A sense of being under-resourced and inequitable treated probably contributed negatively to the collaborative's organizational attitude about its capacity to act effectively, one of the higher elements in Kaplan's framework. It also created a condition of internal debate about allocation of the funds available, which produced some of the tension between the K-W SPC and its partners around the resources needed for regional coordination versus local research and mobilization.

The complexity of this multi-partner initiative also made it difficult to provide support for developing strategies for sustainability of local initiatives. Each SPC committed to work with its community to define a local inclusion project for continuation beyond the SEII Project funded period. Since the scale and complexity of Central West delayed local community mobilization until late in the Project, the time and resources to assist with sustainability strategies were not available.

The preceding would suggest that more funding resources to each local partner might have ensured success with Project objectives at the local and regional levels. Kaplan would hold that the success of any of the local projects would still depend on demonstrated strengths in the first five capacity elements regardless of the level of material resources. It seems clear that, given the weaknesses of the Central West collaboration with respect to the higher order elements in the Kaplan Capacity-building Framework, more funding would not necessarily have enabled the local partners to work more effectively and consistently together to deal with this initiative's complexities and to achieve compelling and coherent regional objectives. It is clear, however, that scaling the Project's ambitions appropriately to the level of resources available is an important success factor.

## **Conclusion**

### Organizational Capacity and Potential for Sustainability of the Social and Economic Inclusion Initiative

Complexity was the dominating characteristic of the Central West *Closing the Distance* Project. It encompassed a huge geographic area in Central West Ontario. In the spirit of inclusiveness, it involved three SEII funded local host organizations, which had not successfully worked in collaboration on a shared project previously. To complicate matters further, and again reflecting a commitment to openness and inclusiveness, it welcomed a fourth region, Elgin County, as an associate partner. The Project defined a broad theme as a focus, isolation and disconnectedness, as applied to two major age groups, youth and seniors. It added the dimension of rural and urban communities in its exploration

of the experience of isolation in these priority populations. It framed its objectives and projected its outcomes for both local and regional results.

This was a lot to expect in an eighteen-month project with limited funding resources. As discussed previously, however, according to the Kaplan Capacity-building Framework the timeframes and level of resources are not primary in determining the success of such initiatives. In the hierarchy of capacity-building elements, clarity of the organization's conceptual framework, an empowering organizational attitude, and coherent vision and strategy are primary in determining an organization's capacity to achieve its mission and goals.

It may be that at the local level the Central West partners could show strength in these key elements. At the regional level, however, the collaborative partnership organized to achieve both local and regional results did not meet the demands of the higher order elements in the Kaplan capacity assessment. As a collaborative, the Central West partnership did not have the capacity to move beyond struggling with working relationships and Project management to coherent regional impacts and outcomes.

As indicated earlier, this experience should not discourage attempts at regional initiatives, nor projects with both local and regional objectives. It does suggest the conditions under which such initiatives might be undertaken (e.g. proven collaborations in which partners have demonstrated a shared conceptual framework and demonstrated a capacity to act) and the process that might increase chances for success at both the local and regional levels (e.g. local focus generating experience and learnings from the ground up for regional implications and possibilities).

As well, the experience of the Central West Project is very instructive on the hard choices that sometimes need to be made when promoting an open and inclusive process. Inclusiveness cannot be assumed as an absolute value. Inclusiveness that ignores other conditions for success can be frustrating and discouraging to organizations and communities. What is more important is that all stakeholders have a fair say in the decision that will set the limits of inclusiveness on any initiative (e.g. geographic scope; priority population). This requirement is a challenge to groups such as the SPNO to develop consensus-building decision-making models, peer-selection methods, and participative-design processes.