# **Vibrant Communities Narratives**

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## **GROUNDWORK PHASE Years 1998-2001**

### **CMO-1: Activating awareness of stalled poverty reduction efforts and the need to scale impact led to the launch of Opportunities 2000.**

Opportunities 2000 (OP2000) was officially launched in 1998 in Waterloo (Ontario) [I336]. Thanks to a paper prepared by the Caledon Institute, a framework thinking about concrete roles that communities can play in poverty reduction was also released [F336].

The launch of this initiative was partly due to an external evaluation of CODA. This 1995 review led to **a recognition** that efforts to reduce poverty had reached a plateau in assisting the unemployed [E8] and **created** **an awareness** of the need to change the scale and impact of CODA’s work [G8]. The evaluation also **motivated** CODA’s organizational leadership to shift emphasis from jobs to poverty reduction, operating approach from programs to broader community mobilization, and overall institutional system change [H9, I331].

At the time of the launch, many members of the Waterloo Region community were experiencing serious social and economic hardships, which included a loss of some 15,000 manufacturing jobs in the 1990s, a polarized labour market, and government cutbacks to social programs and employment services [E331]. Such changes resulted in a rise of the percentage of local households living on low incomes from 12 percent in 1990 to 14.6 percent in 1995 [E8]. In 1997, Lutherwood CODA estimated that 40,000 employable people living in Waterloo Region who either could not obtain work or work that provided sufficient income to keep them above the poverty line [E331]. As a result, many individuals were left to fend for themselves or turn to financially strapped community agencies for assistance [E331].

Given this context, CODA’s developing agenda to support people in their efforts to create their own economic opportunities [H330] resonated with the aspirations of other community agencies and with government and business representatives, and facilitated partnerships with such groups [G330, H330]. The launch was preceded by a 1998 merger between Community Opportunities Development Association (CODA) and Lutherwood [I332], two organizations that shared the desire to achieve a new level of capacity in helping individuals and families become self-sufficient members of a strong and healthy community [F332].’ Partnering funders such as the J.W. McConnell Family Foundation and the Caledon Institute of Social Policy were also on-board at the time of the launch [E15]. In addition to the broader socio-economic environment creating the need for poverty-reduction efforts, funders were attracted by the credible work Lutherwood and CODA had been previously involved in, and by an initial action plan that was formulated by founding individuals. Together, funding contributions provided the project with an initial four-year operating budget of $1.25 million [H333].

### **CMO- 2: Acknowledging dissatisfaction with evaluation results triggered changes in VC’s approach to evaluation**

Towards the end of the initiative’s second year, Caledon Institute assumed greater leadership of the OP2000 initiative, particularly in regards to evaluation [H17]. Adjustments were also made to OP2000’s goals and operation in order to capture greater complexity of the initiative’s work [F339]. These changes followed **dissatisfaction** among the initiative’s leadership regarding the appropriateness of a midterm evaluation and **percieved misalignment** between the evaluation and the initiative [F17].

Commissioned by the Caledon Institute and carried out by a regional univerity that was external to the partnership [F15], the purpose of the mid-term evaluation was to help the project take stock of its work and make any necessary adjustments as it entered the second half of its mandate [F338]. Although the OP2000 partnership formed with the very specific goal of achieving the lowest level of poverty in Canada by helping 2000 families exit poverty by the year 2000 [E15], the evaluation surfaced the contentious nature of this goal [F340]. Although highly effective in summing up the project in a way that made it accessible and appealing to a broad audience, the ‘2,000 by 2000’ target also left room for many different ideas about the precise nature of the work to be done and the results to be achieved [F339]. The initiative’s leadership believed that the project had a more complex set of objectives than what was captured in the ‘2,000 by 2000’ is indicator and reformulated the project’s goals in a way that gave them a longer-term orientation and recognized more explicitly the different aspects of the project’s work [H339, H340].

### **CMO- 3: Activating interest and commitment by community groups to be part of OP2000**

By its fourth and final year (2001), OP2000 had become a robust community wide initiative with 86 diverse organizations and leaders, implementing 47 diverse poverty reduction initiatives [H21]. The initiative had assisted 1,600 households to make significant steps in their journey out of poverty, made poverty reduction a public priority, and created a network of leaders and organizations committed to renewing and sustaining their collaborative work under the new name, Opportunities Waterloo Region [H26].

Leading up to these achievements was a recognition among various community groups in diverse settings that new solutions were needed to cope with the increase in demand for assistance coupled with fewer resources to do the job [E20]. The increase in demand for human service assistance was spurred by factors such as a precarious national labor market; reduced public spending on social programs; and changes in the way responsibilities and resources were downloaded from one level of government to another, and from government in general to individuals and communities [E20].

Mechanisms that helped achieve these successes included the **interest and commitment** by community groups to be part of Opportunities 2000. These were were triggered by the active engagement of a diverse group of community leaders, non-profit organizations, government agencies and local businesses, all sharing the Opportunities 2000 vision [F21].

### **CMO-4: Promoting awareness of the need for renewed innovation and collaboration led to relaunch of OP2000**

In 2001, OP2000 underwent a reorganization and re-launched under the new name, Opportunities Waterloo Region. Desiring to build on the progress of the previous four years, it entered into a renewal year with new staff, partners and funding [H28]. This renewal was spurred by the **recognition** that innovation and collaboration were needed to regain momentum in Canadian and local poverty reduction [E23].

At the national level, factors responsible for the increased need for poverty reduction efforts included: increased social needs due to increased immigration, ageing, and continued depopulation of rural areas with no corresponding social policy action lack of public policy [E7]; high rates of unemployment [E22] coupled with a restructuring of the unemployment insurance program (now known as employment insurance), which led to a sharp drop in the percentage of unemployed Canadians receiving benefits (from 74% in 1990 to 38% in 2002); and a fiscal-first environment, an obsession with the deficit, and changes to social security system including new funding relationships between FPT governments [E11, E13]. At the regional level, an estimated 40,000 employable people living in Waterloo Region either could not obtain work or work that provided sufficient income to keep them above the poverty line [E331]. There was also a plateauing of poverty reduction efforts felt in the region [E24].

The recognition that innovation and collaboration were needed in order to further poverty reduction followed an extensive evaluation performed by the Caledon Institute. The purpose of the assessment was to assess the impact of OP200’s first four years of poverty reduction efforts in the Waterloo Region. It revealed that the initiative fell short of its quantitative target of helping 2000 families exit poverty by the year 2000, but had expanded the capacity for more strategic poverty reduction work in the region in the future [F29].

### **CMO-5: Building confidence in the initiative through effective, early and local experimentation**

Vibrant Communities (VC) was launched in 2002 by 3 national sponsors with complementary expertise and experience [F180]. VC’s initial design included six pilot communities (called Trail Builders) [Backgrounder A30], a Pan-Canadian Learning Community (PCLC) [E40], and a set of guiding principles reflecting whole systems change, capacity building, collaboration and local adaptation [F178, E179, H187, F188, F42]. Trail Builders received funding, peer learning, coaching and evaluation supports [H166, F152, E40, H121] from the national sponsors.

The birth of VC was inspired by both a **strong desire** to reduce poverty among a core group of local and national champions [E34], alongside the **confidence** to take action based on experience with an early local poverty reduction experiment called Opportunities 2000 [H38].

The strong desire was fueled by a relentless dissatisfaction with rising rates and burden of poverty, and a recognition that new approaches were needed. The dissatisfaction was enduring. Over the previous 12 years, municipalities across Canada were trying to develop more equitable, accessible and prosperous environments, though experiencing little success [E30, E152]. Linkages across some of these communities began organically and informally. For example, five began sharing their experiences with city-wide approaches for tackling poverty [F16].

Confidence was built to address the dissatisfaction through promising results from a local experiment. This confidence was generated through specific actions by champions who were part of this experiment. A first action was a reflective process. In late 2001, three organizations who played major roles in Opportunities 2000 reflected on lessons learned [F33]. They concluded that although the local results were promising, it was not possible to declare that the approach it had taken would work in other contexts. Further experimentation with other local initiatives was required to determine the overall viability of the approach, how it might be pursued in different settings and the extent of the outcomes it was able to achieve [H33]. These insights were used to engage a broader community also invested in poverty reduction initiatives. A 3-day summit in 2002 with representatives from 13 communities explored the possibilities of a Pan-Canadian initiative. As a result, VC was born [H150], and so was a new organization that brought together the leaders from Opportunities 2000 and would serve as a backbone organization for VC [Backgrounder A15].

## **IMPLEMENTATION PHASE Years 2001-2004**

### **CMO-6: Inspiring confidence in collaborative action and enthusiasm in the VC model led to expansion of the Trail Builder communities**

This period of expansion occurred between 2001 and 2005 and was marked by the designation of six ‘Trail Builder’ communities. Trial Builder communities are a key component of the overall VC approach, and receive additional support from the national VC level to pilot test new ideas, in return, each of these communities agrees to closely track lessons and outcomes and to share their experiences with the broader VC community [I100]. While national sponsors originally targeted five Trail Builders for the initial phase of Vibrant Communities’ operation, in the end six were supported (Niagara, ON; Saint-Michel, QC; Edmonton, AB; Calgary, AB; Victoria, BC; and Saint John, NB) [Backgrounder A22]. The expanded number reflects the strong interest of communities to develop local initiatives and the desire of all partners for the additional learning a sixth Trail Builder could provide [H152].

Prior to joining VC, participating communities had locally designed initiatives, each with a multisector leadership team [E40]. Each initiative operated in a Canadian region experiencing significant economic and social strife attributable to factors such as loss of important industrial sectors (e.g., Niagara and Saint-Michel) [E32, E43], political restructuring (e.g., Saint-Michel) [E32], rapid population growth (e.g. Calgary) [E38], high bankruptcy rates (e.g. Edmonton) [E101], high cost of living (e.g. Victoria) [E50], and inadequate housing for low-income families (e.g. Saint-John) [E65].

Community agency and community leaders were invited to participate in VC events (e.g., VC summit in 2002 [F38]), attended presentations about the VC approach from leaders such as Paul Born [F32], and convened individuals and organizations with experience in interest in poverty reduction to discuss interest and viability of the VC model [F37, H32].

Despite local efforts, communities continued to struggle with finding innovative ways to reduce poverty. For example, the Niagara region found it challenging to bring together individuals and organizations from across its 12 member municipalities [E36]. In Saint-Michel, enthusiasm had begun to wane as community agencies struggled to impact underlying systems that create day-to-day conditions in order to improve residents’ quality of life [E43].

By attending information sessions about the VC project and discussing the viability of applying this model in their own context, communities were **inspired** by the promising results demonstrated by the Waterloo Region in its efforts to work collaboratively to address issues of community vitality [F32]. The initiative’s proposition to work towards the elimination of poverty in new ways (i.e., in a proactive, coordinated, goal driven, strategic manner) also generated **enthusiasm** and **excitement** [G43]

Communities then moved forward by designing a framework for applying the model and to solicit support for the project (e.g., see H32). In turn, VC provided financial and human resource support in order to assist each community’s application of the VC model in a new context (e.g., see F274).

### **CMO-7: Inspiring confidence in collaborative action and enthusiasm in the VC model led to expansion of the pan-Canadian Learning Community**

Although six communities were first designated as Trail Builders, seven others (Hamilton, ON; Surrey, BC; St. John’s, NL; Winnipeg, MB; Abbotsford, BC; Trois-Rivières, QC; Waterloo, ON), joined the initiative’s Pan-Canadian Learning Community (PCLC) [I46], a network through which local and national partners can learn together about the challenges and opportunities of the approach being explored, building their knowledge and know-how [backgrounder A20]. This first wave of expansion occurred between 2002 and 2006.

Contextually, these organization also faced high poverty rates attributable to factors such as those faced by Trail Builder communities. For example, rate of growth that outpaces the expansion of social and economic infrastructure (e.g., Surrey, BC) [E219]). These communities were also engaged in poverty reduction work prior to joining the VC collaborative and engaged cross-sector partners [E40] and sometimes liked mechanisms to bring together key stakeholders and broker the start of collaborative projects [E53].

As with Trail Builder communities, meetings between VC and various regional stakeholders were held to introduce the VC model [F49]. These discussions generated a **belief** in the value of collaborative action as well as a **sense of confidence** in the local capacity to reduce poverty [F197; E53].

### **CMO-8: Fostering motivation and belonging for expanding the number of Trail Builder communities**

This phase of the VC initiative was characterized by a deliberate expansion of Trail Builder communities from 6-13. To achieve this expansion, two key mechanisms were activated: leaders in local communities were **motivated and encouraged** to join an effective poverty reduction effort [F77]; and a **sense of belonging** to a national poverty reduction initiative was fostered among newly engaged Trail Builder communities [F77].

These mechanisms were critical to activate at a time of funding uncertainty for poverty reduction activities, growing awareness of the demands of Trail Builder status, and a dynamic leadership environment within the VC initiative. After more than a decade of VC activity, many communities across Canada were aware of the substantial effort associated with securing and maintaining Trail Builder status [F85]. Challenges with implementing the VC model had also begun to surface, including difficulties in coordinating national and regional activities as well as creating community roundtables without sufficient funding [E113]. At the same time as new Trail Builder communities were being launched, the VC initiative was also undergoing substantial change, with changes in local convenors and VC sponsors [E113]. However some contextual factors encouraged Trail Builder expansion: there had been consistency in the individuals representing the national VC sponsors [E110], a robust coaching strategy was present in each Trail Builder community, and support was growing among Canadians, communities and governments for prioritizing poverty reduction activities [E113].

To motivate community engagement and instil a sense of belonging in these contexts, a number of scaling up actions were taken: key stakeholders were engaged through policy dialogues and meetings [F111, F168]; funding was secured for Trial Builder expansion [I100]; a plan was developed for expanding Trail Builder communities [F105]; local coaching and learning plans for communities were developed [F118, H74, H52]; tailored Developmental Evaluation and reporting approaches were implemented [H74, H64, F106, F74]; and intentional strategies for disseminating Trail Building results and experiences were put in place (including electronic newsletters, an interactive website, research papers, face-to-face forums, conferences and workshops and a variety of tele-learning forums [F62, F115, F153-160, F243]). These activities (particularly coaching support, regional learning plans, and engagement in the Pan Canadian Learning Community), were reported to assist in connecting communities, and stimulating a sense of belonging to a broader poverty reduction effort [F77]. In addition, the new evaluation approaches and knowledge sharing strategies helped increase the clarity among local partners about the patterns and trends of poverty reduction in their communities and nationally [H103], leading to a sense of motivation and encouragement for community leaders to engage in Trial Builder initiatives [F77].

### **CMO-9: Building confidence, understanding, and a sense of belonging to a national initiative resulted in the doubling of the PCLC**

In 2006, the PCLC expanded to all Canadian census metropolitan areas, thereby doubling its size [I100]. This scaling up was ushered by a sense of **confidence and satisfaction** in the successes of the VC initiative to date [F72]; and **knowledge and understanding** of the issues related to comprehensive collaborative responses to poverty [F116]. Participating communities also valued the **sense of belonging** to a broader, nation-wide poverty reduction effort [F174].

The expansion was timely given that poll data reflected that addressing the issue of poverty had become a priority for Canadian [E113]. It was also likely a product of the fact that local efforts had been positioned to solve this national problem.

Confidence and satisfaction in VC’s successes were generated by promising results, particularly the concrete changes in the lives of those in low income households, which were indicated by the common evaluation process and shared across the learning community [F105].

Numerous activities and supports contributed to the deepening of knowledge and understanding of issues surrounding collaborative poverty reduction and also fostered a sense of belonging to a broader community of learning. These included: a meeting of VC participants in Guelph to share results of VC impact to date, and to review, refine and implement the proposal for expanded trail builders [F105]; the production and dissemination of two VC reports- one exploring the Trail Builder experience and the other providing a summary and analysis of strategies and outcomes (2006) [F106]; the development of communities of practice, which allowed groups to explore emerging ideas and areas of interest [E45]; the development of the Funders Network, consisting of dozens of public, philanthropic and corporate funders who are active in VC at the local and national levels [F169]; and the development and dissemination of peer support and resource materials [E45]. Findings from the experiences of the PCLC and Trail Builders were accessible through a variety of channels. These included an interactive website, tools, papers, conferences, workshops, annual meetings, and a variety of telelearning forums [F115].

# SUSTAINABILITY PHASE 2008-2016 and beyond

### **CMO-10: Maintaining confidence in VC’s leadership and awareness of need for renewal created a sustainable poverty reduction model**

This phase was characterized by efforts to ensure longevity of the VC model. National sponsors focused on increasing local capacity for comprehensive community based poverty reduction approaches [F114] and the adoption of the underlying principles of the VC approach by communitiy agencies as well as provincial and federal levels [E225]. In total, 37 strategies have been undertaken in which local initiatives are partnering with national or regional partners to address policy issues at these levels. In recent years, several provincial governments in Canada have initiated or developed poverty reduction strategies. There is a Trail Builder connection in several of these. For example, a Minister was put in place to help create a poverty reduction strategy in response to Trail Builder calls for all political parties to support the adoption of a made-in-Ontario strategy [H230].

In order to ensure sustainability, the initial VC campaign was wound up in 2011 and the initiative was re-envisioned and re-launched once more, this time as Vibrant Communities: Cities Reducing Poverty. Led by Tamarack, the initiative consists of a network of cities and regions that have active aligned poverty reduction strategies and multi-sector roundtables [F245]. As of 2014, its membership had grown to 43 municipal regions but its goal is to bring an additional 57 members into the fold by 2016 [H251].

This most recent renewal of VC was spurred by **confidence** in VC’s leadership for leading ongoing efforts to eradicate poverty [F248] and the **realization** that re-envisioning of the initiative was required in order to continue to meaningfully reduce the human, social and economic cost of poverty for Canadian cities.

Several challenges to expanding the initiative in preceding years (2006-2008) created a realization that re-envisioning their poverty strategies and operations once more was key to sustainability. For example, national staff struggled to develop and implement a compelling expansion plan, which was complicated by high turnover within VC staff and sponsors, and an increased number of national, provincial and local organizations working on poverty [E142]. Inability to sustain and grow their work resulted in one of the original six Trail Builders (Opportunities Niagara) to close its doors and declared bankruptcy (2008) [E194]. An end of campaign evaluation released in 2010 demonstrated that Trail Builders experienced a great deal of variation in the nature and scale of the outcomes they achieved so that while progress was made in one area, new challenges emerged in others. However, prototyping the VC approach had generated many innovative strategies for poverty reduction that in turn benefitted a high number of low-income Canadians [H213].

Despite some challenges to sustaining and implementing the pervious VC model, when 45 leaders from across Canada [F206] attended a strategic dialogue on the future of poverty reduction in 2010, one of the key conclusions was that VC is a natural leader in Canada’s ongoing eﬀorts to eradicate poverty [H248]. This confidence VC’s leadership is undoubtedly attributable to the initiative’s demonstrated ability to convene and encourage collaboration among key stakeholders, provide support to community agencies, secure funding, and ultimately demonstrate positive outcomes in poverty reduction.

In order to increase the likelihood of the initiative’s ongoing sustainability, VC secured funding for all Trail Builders until the end of 2011, and made sure that each had the support necessary to achieve good outcomes [F114]. VC sponsors also worked to secure additional financial and technical support for communities interested in, and capable of, sustainability [F123], and VC network representatives met to explore how to develop local and regional capacity (2009) [F198]. As the initiative scaled up to include more communities, the funding model was also adjusted. Where VC was initially funded by foundations, government funds, and corporate sponsors and in turn provided grants and matching funds to regional initiatives, local community efforts are now funded by a wide variety of local partners. Nationally, each community pays an annual membership fee to sustain the learning community efforts [E314].

VC also promoted the long-term proliferation of its impact through the expansion of mechanisms for encouraging broader learning outside the network [F114]. This included: mining and documenting as much learning as possible, for example, factors that may have contributed to the demise of Opportunities Niagara [E194, F296]; continued advocacy for provincial and national policy change; speaking engagements involving multi-level and multi-site stakeholders interested in poverty reduction and hosting national roundtables to discuss issues connected to poverty [F300][H301]; and developing, disseminating, and discussing an adaptable national framework for change [H327]. Finally, VC also continues progressive development of a shared measurement system, including common indicators and reporting. For example, the initiative has recently partnered with the Canadian Council on Social Development’s Community Data Program in order to develop a set of 12 indicators that member communities can use to examine residents’ movement out of poverty [F320].