

## *Opportunities 2000's Year of Change*

*Caledon's 'community stories' series has documented many initiatives undertaken by Vibrant Communities participants. This story describes some of the challenges associated with maintaining the mission focus and momentum of community collaborations.*

### ***Introduction***

Opportunities 2000 (OP2000) was an award-winning community revitalization initiative that operated in Waterloo Region from 1997 to 2000. It brought together more than 80 partner organizations as well as people living in poverty and launched 47 projects aimed at reducing poverty. OP2000 expanded the vision of many people working in the nonprofit sector such that they used their financial and human resources in new ways. It reaffirmed the value of working together to solve tough problems – something Waterloo Region residents have done throughout their history.

OP2000 was conceived by members of Lutherwood CODA, a blend of two organizations with deep roots in the region. Lutherwood was a boys' residential treatment program – established by the Lutheran Church of Canada – which later diversified into a human services agency. The Communities Opportunities Development Association (CODA) was a coalition of labour, church and community organizations created in 1984 to tackle employment-related issues that resulted from widespread manufacturing layoffs in Waterloo Region in the 1980s. The two organizations wanted to establish a partnership that would help people create their own opportunities for moving out of poverty.

OP2000 participants had set the goal of assisting 2,000 families to exit poverty by the year 2000. Though they ultimately were not entirely successful in reaching this target, they helped at least 1,600 individuals make significant steps in their journey out of poverty. (Evaluation procedures used at this time focused on nonprofit efforts and did not include outcomes from business or government initiatives; actual numbers of people helped may have been significantly higher.)

An equally important objective was to build the community's capacity to combat poverty on a long-term basis. The slogan '2,000 by 2000' helped the community organize around an idea that was greater than anything individuals or single organizations could accomplish by themselves [Leviten-Reid 2001].

OP2000's key elements included a 20-member Leadership Roundtable (LRT), ongoing research by the Caledon Institute on policies and practices for community-based poverty reduction, a core staff that provided technical assistance, and partnerships that could generate income and employment opportunities. Relationships built through CODA and the proven abilities of key staff including Paul Born, Allan Day and Mark Cabaj attracted financial contributions from the J.W. McConnell Family Foundation, the Atkinson Foundation, the Royal Bank of Canada and several local businesses and individuals.

LRT members were drawn from nonprofit, faith, education, government and business organizations, and people who lived on low incomes. They met regularly to review plans and chart progress. Initially co-chaired by hospital CEO Pat Henderson and Ernst and Young Human Resources Manager Joe Allen, OP2000 began to build a reputation as a dynamic poverty reduction vehicle. Some \$1 million in funds from (then) Human Resources Development Canada were directed to launching 18 projects to help households improve their financial, educational and social circumstances.

Says Pat Henderson: "One of the proudest accomplishments of that period is the fact that many of those 47 projects continued well past the start-up phase. Of the 18 major initiatives we launched with HRDC funds and contributions from 21 other partners, most are still in existence today." OP2000 staff members worked with many nonprofit organizations during this time to help them develop programming and staff capacities.

### *A changing environment*

Throughout OP2000's lifespan, community organizations took most of the responsibility for initiating action. Residents, business and government representatives played a supportive role, providing access to people and resources. However, the way government funded and related to the work of nonprofit organizations underwent profound changes near the turn of the millennium. Support that had been based on giving and investing moved toward a model in which payments were tied to defined activities and outcomes. This tightened control was at odds with the principles established by the voluntary sector to build community capacity and support community-building efforts [Cabaj and Leviten-Reid 2006].

As a way to potentially bridge traditional nonprofit activity with the newer business-oriented model of government funding, Paul Born began discussions in 2000 with representatives from DuPont about their work in social innovation. Talks with DuPont representatives Christine DeGrow and Colleen Brydon led to an investment of \$100,000 over two years to help formulate a direction and focus for OP2000's transition.

Says Colleen Brydon: “We were particularly interested in sharing and learning about processes that would lead to greater outcomes – what we term social innovation. Our interest and involvement was on adapting our processes and methodologies to help OP2000 arrive at an outcomes-centred focus rather than a project-centred one.”

### *New name, new personalities*

OP2000 was originally structured as a one-time, campaign-style initiative. But in the minds of many Leadership Roundtable members and partners, the project’s track record of innovation and partnership was something they wanted to preserve and extend. The experience of working in a multisectoral, collaborative way had changed how members of the community thought about poverty reduction and they believed OP2000 filled an important role as convenor and facilitator for the work.

#### *Transition Timeline – OP2000 to Opportunities Waterloo Region*

##### **1996**

Design and mobilization of funds for Opportunities 2000

##### **1997-2000**

Opportunities 2000 – a millennium project – begins and continues to evolve over the next four years.

##### **Late 2000**

Leadership and partners discuss if and how to renew OP 2000 and come to an agreement that the initiative will continue. Funds for a transitional year are secured from several organizations. A working relationship is developed with DuPont Canada to facilitate strategic planning for the next phase, with the understanding that resources for a multi-year process will be mobilized on the basis of a new plan.

##### **2001**

Paul Born (Consulting Director) and Mark Cabaj (Coordinator) move into supportive roles. Allan Day and Grace Sudden assume Transitional Coordinator duties.

##### **2002-03**

A Director and staff are hired. OP2000 is now Opportunities Waterloo Region with a plan that focuses on the working poor and at-risk youth. A second Director arrives and leaves one year later. DuPont involvement bridges staff transitions.

##### **2004**

Leadership Roundtable Chair asks for one more year to get the initiative on a better footing. A new Director and refreshed Leadership Roundtable work to reinvigorate the initiative and strengthen relationships.

LRT members decided to renew their mission, plan and membership for another multi-year initiative. Determined to keep the momentum they had built over the previous four years, they decided that a transition team should focus part of its energy on reorganization efforts and the other part on continuing existing projects. In late 2000, Paul Born switched roles from Executive Director to Consulting Director. Until the end of 2001, he played a supportive role on the LRT, including his efforts to involve DuPont in transition activities. During this period, former staff member Mark Cabaj worked part time as Coordinator, managing OP2000's day-to-day operations and stewarding the Leadership Roundtable process.

At the beginning of 2001, Allan Day shared the position of Transitional Coordinator with Grace Sudden, a regional councillor with 20 years of experience in municipal government. Says Allan: "Part of the transition plan included making a shift from operating a wide array of projects to focusing efforts in selected areas. By default, this meant that many of the original 86 partner organizations became less involved. Grace and I led the search for areas of focus but we were not planning to act as project leads – we hoped that others would come on board to direct specific activities. The time lag between strategy selection and securing dynamic leadership caused us to lose momentum. Ideas and engagement must go hand in hand."

Mark Cabaj reflects that the amount of time and energy given to the process of transition left too little for project work. Says Mark: "Though we tried for a 50:50 transition to project ratio, our actual work breakdown was 70:30. In hindsight, we should have reversed this and spent 70 percent of our time on activities and partnerships and 30 percent on transition."

Paradoxically, it was DuPont's priority to help project participants gain clarity on what they were trying to achieve. From DuPont's perspective, projects should emerge from well-defined outcomes.

DuPont's Christine DeGrow and Colleen Brydon agreed to facilitate the LRT's work in three areas: managing the transition period, developing new strategic directions and building staff capacity. Their involvement covered a period in which three sets of leaders – two Transitional Directors followed by two Executive Directors – passed through the project's doors. With each one, the initiative's vision (and DuPont's place in the operation) became less clearly understood.

Says Christine: "The original OP2000 staff members were very supportive of our business process. In hindsight, however, I realize that we needed to spend more time at the outset detailing the very different perspectives each partner brought to the work. For example, business tends to choose strategic areas to pursue, while the community sector prefers to allow opportunities to emerge naturally. In addition, though we were successful in helping the LRT establish new directions, efforts to implement the work were hampered by a leadership that changed several times. Each new leader came with their own vision of the work."

DuPont's entry and suggested changes in operating procedures had yet to be fully integrated into OP2000's work before the change in structure occurred. In addition, the initiative – now named Opportunities Waterloo Region – was undergoing a separation from its original parent organization,

Lutherwood CODA, a process which included applying for and achieving charitable status. These changes and the shifts in leadership took a toll. By late 2003, Opportunities Waterloo Region staff members were trying to keep three projects afloat and the initiative teetered on the brink of insolvency.

### *Back to the fundamentals*

In the summer of 2004 when the initiative stood contemplating its very survival, Pat Henderson assembled eight key Leadership Roundtable members to determine whether Opportunities Waterloo Region should be given one more year to set its affairs in order. Says Pat: “In one year, the organization had completed a successful initiative that helped 640 low-income Waterloo Region seniors to access the Guaranteed Income Supplement, effectively bringing \$1.6 million into the community. When a small organization can marshal the creativity and energy to achieve that kind of success, it deserves a second chance” [Makhoul 2005].

Pat worked with Opportunities Project Developer Sanjay Govindaraj to scout out director candidates who would have the community experience and leadership skills necessary to revitalize the initiative. Mary MacKeigan had worked on an OP2000-inspired project at the Cambridge Self-Help Food Bank and considered the Director’s position the ideal job. Within a short time, she drew together a new Leadership Roundtable. Pat Henderson assembled an action-focused board of directors and Opportunities Waterloo Region quickly got busy establishing a Social Purchasing Portal for the area’s employers and prospective employees.

Mary MacKeigan’s view is that Opportunities Waterloo Region needed to focus on relationships. Says Mary: “We needed to remember our community roots and allow ourselves time to strengthen our relationships in order to build a platform for long-term change.”

The early, heady days of OP2000 were exciting because they offered a way to launch many projects quickly. The process effected a community shift both in how people viewed poverty and the benefits of adopting a collaborative, multisectoral approach.

By contrast, Opportunities Waterloo Region offers an example of a more traditional, community-focused undertaking. It overcame the period of transitional instability by rebuilding relationships and promoting poverty reduction strategies brought forward by the community. Three years after its lowest point, the effort has renewed its vision and rebuilt community excitement and momentum. As well as launching a Social Purchasing Portal, Opportunities Waterloo Region is directing a project aimed at increasing access to recreation for area youth. It is facilitating discussions and research, and building awareness about rural and urban sustainable livelihood wage issues. It is also focusing on addressing policy issues. Plans for a comprehensive regional poverty strategy are taking shape, and the organization is igniting interest and action around a national campaign to shift societal attitudes towards poverty.

## *To be or not to be*

Opinions differ on whether OP2000 ultimately should have ended in 2000. Its moment of decision presents many intriguing ‘what ifs’ for Vibrant Communities convenor organizations.

Says Paul Born: “My initial request to everyone was to shut the work down. OP2000 was created as a millennium campaign and I felt that it shouldn’t continue, that we should create a space for something new to emerge. In hindsight, we should have planned an ending and a continuation, weighed both and asked ourselves which was the better route. Ultimately, the group wanted to continue, so I raised the money and wrote a good transition plan. The change in personnel and approach created uncertainty, however, and DuPont assumed a larger role than it might have otherwise. Once the initiative’s directions were set, DuPont became more focused on its third task – developing staff capacity. From a distance, Opportunities Waterloo Region appeared more inward- than outward-looking, which helped further douse the project flame.”

DuPont’s role changed several times over the course of its involvement and was significantly different from input provided by other corporate partners involved in the Leadership Roundtable. Discussions with DuPont led to them making an investment and assuming the attendant role of paid consultant. Says Allan Day: “It becomes more difficult to critique input when money is brought to the table. Having DuPont involved as a volunteer consultant might have helped us to integrate their ideas more quickly and easily.” With each change in leadership, Christine DeGrow found herself filling the gaps that emerged – supporting staff and joining the LRT. Each of these role changes was significant and reflected the struggle to find the right leadership, partnership and strategy combinations to reignite the project’s purpose and direction. An important learning opportunity was missed by not taking the time to discuss the impact of each role change on operations and partnerships.

Paul Born believes there are other key questions that should have been more fully explored at the point of decision when OP2000 completed its original campaign period:

- Should OP2000 have continued or were people making an error in assuming there was still pent-up community energy to do more? What was the ‘more’ they wanted to do?
- How does a convening organization balance an outcomes focus with the traditional voluntary sector expectation that projects will emerge spontaneously from the community?
- If the organization had chosen not to continue, what else might have emerged into the space created by its absence?
- What did we learn that might help other groups as they face transition? How well did we recognize and articulate the elements of transition – structure, leadership, strategy, organizational culture? How can we learn from future transition work?

Says Paul: “Asking the question of why an initiative should continue is not saying it shouldn’t continue, but it allows people to think about the energy and money required and to consider whether

these could be used elsewhere to do more. They can consider whether a project should continue along a set path or whether it should create something new.”

Time-limited campaigns allow intense bursts of activity around clearly defined goals. They can be as effective in bringing about community change as any established organization. The challenge arises when a campaign seeks to become a long-term movement for change. Holding a community’s imagination and sustaining momentum require clear plans and objectives. Says Paul: “Organizers should have a really good idea of what they would like their enterprise to look like in a year, and if necessary, use that time to wind down the work and move on to something else.”

There are many examples of organizations grappling with these questions, but little has been written about the impact of short, four- or five-year campaigns versus ongoing approaches. As Vibrant Communities and others seek the best way to get at the roots of poverty and address issues of community inclusion, asking the right questions becomes ever more important. Is doing the same kinds of projects over and over the route to go (the Band-Aid route), or do organizers want to try an experimental, targeted cure? Which choice serves the community better? What are the costs of transition? If organizers wish to change a campaign into an ongoing organization, do they appreciate that they are no longer working with the same animal? How can we compare the poverty impacts of a campaign with the results achieved by longer-term initiatives?

These are important questions for organizations that want to significantly reduce poverty. They are also questions that the members of Vibrant Communities are exploring in municipalities across the country.

*Anne Makhoul*

## References

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