

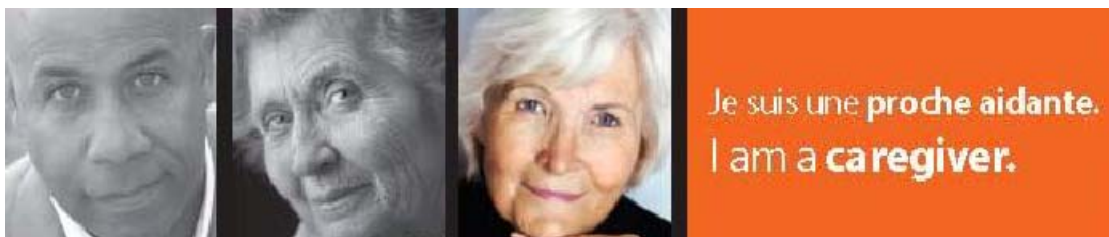
## *Effecting Policy Change: Lessons from the Canadian Caregiver Coalition*

### *Introduction*

The Canadian Caregiver Coalition (CCC) will remember the 2011 federal election as being the first in which caregiving and the needs of Canada's aging population were on every major political party's platform. There are no coincidences in politics. If an issue is on a platform or a policy agenda, it's because someone or a whole lot of someones worked long and hard to put it there.

The CCC's core mission is to influence the Canadian policy landscape in order to better serve the needs of caregivers. This story describes CCC's effort to find a structure and mindset that allowed it to develop a more targeted approach to advocacy. Second, it presents details from the coalition's work to build a caregiving policy agenda. Third, it reviews the impact of sharing or 'scaling out' its knowledge and lessons about organizational change and advocacy to the recently-established Ontario Caregiver Coalition.

*Caregiving is a term that describes the activities of individuals who provide assistance with everyday living activities for family members and friends whose independence is compromised by physical, cognitive or mental health conditions. Besides carrying out personal and home maintenance tasks, caregivers may also act as brokers, coordinating the various services required by the care recipient.*



## *Time for a change*

Human enterprises undergo stages of birth, maturation, decline and, if conditions are right, renewal. Five years ago, CCC was uncertain of its role and future. Formed in 1999 to advance a caregiving agenda across Canada, CCC's original purpose was to join with caregivers, service providers, policy makers and other stakeholders to identify and respond to the needs of caregivers. Initially, members included researchers, government officials, professionals and organizations with interest in and commitment to caregivers. Through a secretariat, they supported and encouraged research and education activities, undertaking policy work as their time and resources permitted. Funding from Pfizer Canada covered CCC's development costs over the first five years of its operation. The J.W. McConnell Family Foundation also contributed funding in support of specific activities.

Faye Porter was the founding President of CCC and Vice-President National Programs at VON Canada. Says Faye: "As CCC grew into a voice for caregivers, the Board realized that they wanted to hear more clearly the voices of family members who provide care. Board members felt that by becoming a consumer-led group, they would both broaden the CCC's appeal and more firmly root our policy messages in people's every day caregiving experiences."

Accordingly, CCC's membership underwent a shift in the mid-2000s. But it was soon recognized that individual caregivers did not have the time or resources to sustain an advocacy organization. Subsequent CCC Presidents Lorna Hillman, (interim President) Esther Roberts and Palmier Stevenson-Young worked to maintain the coalition's membership and funding structure but, by 2006, members realized that the organization needed to review its operations.

'Virtual,' 'un-organizational' and community of practice models had begun to be adopted across the not-for-profit sector in the early 2000s. Noted for their lack of formal structure and a focus on intent, their foundation is the trust that builds from relationships [Jurbala and Bird 2010].

By January 2007, it had become clear that a CCC renewal was both possible and desirable. The continued interest of four organizations – VON Canada, René Cassin CLSC, Comcare Health Services and the Canadian Home Care Association (CHCA) – and the McConnell Foundation's continued commitment to CCC's work were two important ingredients in the organization's restructuring.

Board member organizations re-committed to building pan-Canadian partnerships with caregivers and government representatives, advancing a grass roots approach, and informing policy development and direction. They signalled their readiness to support a modified CCC by detailing the specific inputs and expertise they could provide. CCC held an executive meeting to develop a detailed sustainability strategy and, by the fall of that year, a new structure had been sketched out. In early 2008, CCC began operating with four signatory partners. Nadine Henningsen from the CHCA assumed the CCC President's role.

In June 2008, CCC and the McConnell Foundation co-hosted a workshop entitled “Social Innovation and Family Caregiving in Canada: The Need for System Transformation and Putting Caregivers First.” Key topics included the transformative possibilities of social innovation, the use of Strategic Inquiry, network development and the need for more refined systems change action strategies. The ideas and conversations generated by this event greatly challenged, inspired and energized the 20 participants from across the country.

<i>CCC Signatory Organization</i>	<i>Representative</i>	<i>Operational role</i>
Canadian Home Care Association	Nadine Henningsen, Executive Director	CCC President, Communications and Media Relations (Support Secretariat)
CSSS Cavendish – Installation CLSC René-Cassin	Lucy Barylak, Coordinator	Research/Partnership and Community Relations (for Québec)
Revera Inc.*	Janet Ko, Senior Vice- President, Communications and Public Affairs	Partnership and Community Relations
Saint Elizabeth Home Care**	Joan Lesmond, Executive Director, Community Engagement	Research
VON Canada	Bonnie Schroeder, Director, Caregiving Practice, Quality, and Risk Team	Partnerships and Community Relations (supports Financial and Legal Relations)
	Marg McAlister	Contract Support

\* Revera Inc. purchased Comcare Health Services in 2011 and assumed its CCC signatory role.

\*\* Saint Elizabeth became a signatory partner in 2010.

CCC’s newer approach was built on the strong relationships it had developed among caregiving organizations across the country in its early years of operation. This foundational work, along with the close contact and issues familiarity that grew from its caregiver-focused period, had built CCC’s capacity and reputation as a clear voice for the issue of caregiving. At the same time, VON Canada partner Bonnie Schroeder reflects: “We recognize that we are a voice and have become more of a touchstone for the *many* voices of caregivers among our partners.”

CCC’s partners now include 42 professional caregiving agencies, caregiver support groups, national stakeholder organizations and researchers. Partners generally fit four categor-

ies of involvement, from interested to engaged, active and signatory. In regard to policy work, signatory partners take a shared approach in which any group may initiate action. Instead of trying to get all partners to agree to a standard position, messages are structured in a way that allows partners to promote those elements that resonate with their constituents while supporting the overall goal of increasing the recognition of caregiver issues.

Rather than coalescing around an organizational structure as the vehicle that will carry policy initiatives, CCC's leadership now speaks of the passion for the work that is both the glue that bonds the coalition together and its driving force for change.

### *Strategic inquiry*

The McConnell Foundation identified a focus on caregiving and respite issues in the late 1990s. After CCC's re-organization in 2007, McConnell agreed to support the coalition's work, in particular connecting CCC signatory partners with experts in the art of policy development, advocacy and social change. Through a rich partnership with consultant Sean Moore and inspiration provided by PLAN Institute Advisor Al Etmanski, CCC learned many important lessons about the blend of skill, persistence and serendipity that turns policy proposals into political reality.

Now a fellow with the Social Innovation Generation initiative (SiG),<sup>1</sup> Sean Moore was a partner and public policy advisor at Gowling Lafleur Henderson LLP until late 2007. Applying techniques honed by approaching government on behalf of business clients, Sean developed a model for Strategic Inquiry (SI) that supports public policy advocacy. He currently helps groups sharpen the listening and writing skills they need to get their policy asks right. Says Sean: "SI teaches people to ask for what they can get instead of what they want."

Strategic Inquiry is an on-going process of engagement and exploration with government decision-makers and advisors that aims to achieve an organization's long- and short-term public policy and political goals. It is used to conceptualize an issue in a broad context, understand the motivation of government and learn its language.

SI is premised on the belief that the most important phase of any public-policy advocacy effort is usually the determination of an ask to be presented to government that both meets the advocacy organization's objective *and* adequately takes into account the political and public-policy environment in which the advocacy is taking place. The insights and strategic intelligence that are gained in constructing the ask also help inform other key elements of one's advocacy strategy and plan. These include timing considerations, identifying key advocacy targets, linking with collaborators and potential coalition partners and selecting which of many tactical options are most relevant [Moore 2011].<sup>2</sup>

Neither mysterious nor manipulative, SI is about putting the asker into a government mindset. By understanding politicians' and bureaucrats' top-of-mind issues, pressures, likely

policy developments and the players involved, the inquirer is able to shape the needs of their audience into messages that government can ‘hear.’

Says Sean: “In Canada, government people like to deal with the principal members of an organization, not an advisor or ‘hired gun’ lobbyist. I begin by imbuing an understanding of why SI is done and then I teach groups how to use the information it generates in their planning.”<sup>3</sup>

The Coalition identified an overall goal for its Advocacy Initiative. It would: “... have announcements made by the federal and provincial governments of specific changes in public policy that manifest support and acknowledgement of family caregivers.”

With Sean’s help, the CCC signatory partners put together a proposal for designing and implementing an advocacy strategy and plan. Marg McAlister, principal of MMC Consulting,

### ***Lessons from a Strategic Inquiry advisor***

*How the work gets done:* SI takes a great deal of time, thought and effort. Sean has found that organizations which try to do the work as time permits, or that hire an outside person to do the work in a project-like manner, are less successful in getting their policy messages heard. To be done well, advocacy must be incorporated into the everyday activities of a core team of people who are tasked with the work.

SI gives people an overall sense of an issue, so requires the gathering of a great deal of relevant information. This includes identifying a wide circle of key players, developing an understanding of government’s decision-making process and where an issue fits within that process, and determining whether the issue is on a slow or fast timetable.

*Not a one-time exercise:* SI is a process that improves with repeated use. Ideally, organizations should establish a regular cycle of inquiry, message distillation and position paper submission at appropriate points in governments’ budget cycles. Says Sean: “Things change continuously in government, so a regular sounding of politicians, bureaucrats and other stakeholders ensures a consistent ability to influence policy direction. Building this work in with an organization’s other advocacy tasks is ideal.”

*Messaging:* Do not cast your ask of government in concrete until you do your Strategic Inquiry – you

might find out that it’s really wrong and that there are lots of other things you should be asking for.

*SI decision-making lesson:* In order to make many of the highly responsive political decisions that go into an advocacy strategy, organizations need to develop a small group of key decision-makers who have the authority to make quick decisions. This group should be tasked with thinking through the SI details and drilling down to key choices.

*Dealing with perceived government inaction:* Organizations should consider carefully before releasing the ‘hounds of irritation.’ It can be like asking someone to do you a favour, then criticizing them for not helping you. Yes, it can take government a long time to move on an issue – but are you really sure of what they’re saying ‘no’ to?

*Don’t get mad:* Instead of expending energy trying to make a government look bad, try these approaches: 1) Get good at aggressive opportunism. If a politician or bureaucrat is saying anything remotely close your issue, immediately give them credit or profile for it. 2) Anytime there’s a news story that’s a tragic or awful story which is the result of the absence of your perceived solution, be ruthless about going out and talking about it. Letters to the editor can get great media pick-up.

was hired to steer CCC's Advocacy Initiative. Her background in acute and home care nursing, her tenure as COO of Comcare Health Services (a pan-Canadian home care agency) and her experience as a consultant working on policy, project management, communications and strategic planning made her the ideal candidate for the position.

In early 2008, Marg – with support from Sean – guided the first round of Strategic Inquiry and subsequent analysis. SI includes the development of a briefing note – a one- or two-page time-saving device that lays out what is happening in regard to the issue from a wide lens policy perspective, the associated challenges and problems, options and questions. Such a note is followed by discussions with key people in a variety of government offices and other stakeholders outside of government. In CCC's case, this process helped inform the development of a preliminary advocacy strategy and plan – all in preparation for the 2008 federal Budget. Says Sean: “The steep learning curve and short time frame made this an overly ambitious but highly instructive exercise.”

### *Strategic Inquiry successes*

The CCC's new structure proved its mettle during the first round of Strategic Inquiry, allowing for rapid but comprehensive review of SI findings and timely forging of consensus on the specific asks to be made of the federal government. Though no mention was made of caregiving in the 2008 Budget, the experience generated the desired high-level conversations among federal department contacts and helped confirm CCC's new advocacy course. There was also an encouraging phone call from the Prime Minister's Office that the materials submitted had provided much food for thought, and a reference to caregiving in the November 2008 Throne Speech.

Many little and big tasks go into building an effective advocacy strategy. Groups must develop a facility with crafting succinct briefing notes and letters in advance of SI meetings that include relevant facts and options for action. Conducting telephone and in-person interviews requires both confidence and the ability to identify and follow leads that may not fit the original meeting script and briefing note. Building a strategic plan involves developing short-, medium- and long term objectives, an overall strategic approach, key messages from interviewees, strategic considerations, possible asks (and arriving at one or two key ones) and specific tactics.

The 2009 Budget cycle saw CCC undertaking a second round of SI and building upon its previous experience to engage a different and more diverse group of politicians and bureaucrats. The first SI sessions had taught CCC that several government departments were working on various pieces of the caregiving agenda; a thorough understanding of each department's goals and objectives was needed to craft a comprehensive message. CCC now had the relationships and process expertise it required to undertake successive rounds of Strategic Inquiry at the federal level.

Says Nadine Henningsen: “The relationship among CCC's signatory partners is remarkable in that we are able to move very quickly from concept to concrete action. Our ability to

provide one another with input and ideas at a moment's notice has resulted in many successes, and each one fuels the next. We respect one another's autonomy and expertise, and the combined energy of the group has benefited both our individual organizations and the shared advocacy work."

The Advocacy Initiative involved doing many things differently. Says signatory partner Lucy Barylak: "We have learned to keep our core message – "A Canada that recognizes and respects the integral role of family caregivers in society" – front and centre. We also learned to apply a different set of ideas about leadership to our advocacy work. CCC's shift to a virtual structure had changed 'control and command' thinking to a newer, shared model of leadership. Sometimes organizations have to fight the urge to be the central, go-to group on a particular issue, but we are recognizing that that is not a sustainable position. Advocacy requires the ability to let go on occasion and allow others to move the agenda. At other times, the agency leading a particular process must take charge – all depending on partner needs and what appears to be the clearest route forward."

Besides learning to work together differently as coalition partners, the CCC learned a great deal about the relationship between bureaucratic and political sides of the policy table. Both groups have to align – the metaphor of planets spinning in different orbits is appropriate – for desired policy shifts to come about.

Says Marg McAlister: "We have learned to work both sides of the policy equation. Strategic Inquiry taught us how to have intense conversations. By asking the right questions, you get a wealth of information. You also find out just how much pressure politicians are under, how many complex issues they have to deal with. I've learned to keep uppermost that politicians and bureaucrats went into their line of work to make the world better. Acquiring the language of legislation and framing memos to Cabinet that are quickly and easily assimilated into existing areas of knowledge is part of my job. It comes down to serving the person better so they can do the job you need them to do."

A landmark development resulted from CCC's persistent efforts between 2008 and 2009 to engage the Liberal Party of Canada's various platform committees in discussions around caregiving. That party's eventual commitment to the issue – spread out over two leadership changes – influenced the other national political parties to do likewise.



## ***A sampling of CCC messaging***

**Early days – 2002:** CCC recommends that the federal government:

- Focus on caregivers as integral partners in care
- Ensure genuine choice for caregivers
- Provide a comprehensive package of services to people needing home and community care.

**Post-2007 re-organization – 2007-08:** CCC asked – and continued to ask – that the government create an Expert Advisory Panel to signal serious intent on the issue of caregiving.

**August 2008:** CCC recommends that the federal government commit to the implementation of fiscal measures to support family caregivers. It further recommends that these fiscal measures should be identified and evaluated by a panel of experts.

**December 2009:** CCC offers short- and longer-term recommendations in order that the federal government demonstrate both responsiveness to today's need, and awareness of the complexity and multiple dimensions of support required to appropriately address family caregiving within Canadian Society.

**August 2010:** "Caring for the Family Caregiver" submission recommends that the federal government introduce the following measures to support family caregivers:

1. announce a National Caregiver Strategy as the basis for a dialogue with the provinces and territories regarding coordinated measures that focus on family caregivers and can be readily implemented
2. enhance current financial tax credits so that more caregivers can benefit
3. modify the Canada Pension Plan so that those with reduced income as a result of family caregiving are protected
4. support cross-country consultations to enhance the General Social Survey Cycle which is dedicated to family caregiving.

**May 2011 federal election:** CCC offered the parties three major policy recommendations to consider:

### ***Recommendation 1: Announce the Establishment of a Canadian Caregiver Strategy***

The Federal government must take a leadership role in setting the values to which federal, provincial, and territorial government collaboration can begin in order to further develop the core elements described in the CCC Caregiver Strategy (see above) and address the challenges facing family caregivers.

### ***Recommendation 2: Enhance Current Tax Credits***

The credits could be enriched in two ways:

- Increasing the amount of both credits which would help caregivers with more of the costs they incur.
- Modifying the caregiver credit to phase out more gradually with the dependant's income which would assist more caregivers. Making the caregiver credit refundable, as Quebec has done, which would extend support to lower-income caregivers.

### ***Recommendation 3: Support Financial Security through Modifications to the CPP***

The Canada Pension Plan could be enhanced in the following ways:

- Apply CPP dropout to individuals who have left work in order to provide care of adult family members
- Institute government pension contributions on the hours of work provided by family caregivers effectively ascribing a value to caregiving
- Create a caregiver-specific pension which would operate like an income supplement.



CCC's work in advocacy has also led to discussions with organizations that have similar policy concerns – e.g., health groups and child poverty reduction initiatives. These are resulting in synergies and partnership possibilities where none had previously existed.

CCC's message continues to evolve, but is always framed within the Canadian Caregiver Strategy. The strategy includes five critical elements which have been confirmed as representative of caregiver needs by individuals and organizations across the country:

- i. safeguarding the health and wellbeing of caregivers
- ii. minimizing excessive financial burden placed on family caregivers
- iii. enabling access to user friendly information and education
- iv. creating flexible workplace environments that respect caregiving obligations
- v. investing in research on family caregiving as a foundation for evidence- informed decision making.

The strategy now acts as an umbrella document under which partner organizations may see areas of overlap in which their own concerns are reflected. It also helps them identify areas that fall outside of the strategy for which they may choose to conduct their own advocacy work.

### ***Scaling out organizational and advocacy lessons***

Many of the policies and practices which support caregivers fall under the jurisdiction of provincial and municipal governments. One of CCC's advocacy goals was to encourage the development of provincial caregiver coalitions in order to increase the number of voices advocating for the family caregiver. Where coordinated caregiver networks and associations already existed, CCC offered to act as a sharing and connecting mechanism. It provided guidance and advice with respect to working with governments on policy issues, sharing its expertise and lessons with those groups that were ready to undertake advocacy initiatives. Says Nadine: "CCC can now provide hard evidence of its advocacy successes, which we see as the *raison d'être* of any caregiving coalition."

In Ontario, CCC was instrumental in bringing together like-minded organizations, sharing its experiences in coalition development and Strategic Inquiry. It helped stimulate the formation of a provincial coalition in 2008. The new group's organizational objectives were to advance caregiver policy initiatives to government and other key decision-makers and raise awareness on caregiver issues.

One piece of CCC advice was that the Ontario group should steer away from the potential pitfalls of a membership-driven organization and envision itself as a virtual partner coalition. The Ontario Caregiver Coalition (OCC) has emerged as a virtual structure and built a financially stable base by asking potential partners to consider both making in-kind contributions of knowledge, experience and contacts and directing funds toward particular projects.

Ellen Nemetz is the Manager of the System Innovation Strategy Unit at the Ontario Ministry of Health and Long-Term Care. Caregiving had begun to be identified as a policy issue shortly before OCC was established in 2008. Ellen’s colleague had previously conducted large stakeholder meetings on the future needs of caregivers. Strategic themes were identified and when that project ended, Ellen and her group began to propose actionable policies. In 2009, OCC entered a formal partnership with the Ministry and several members were invited to a December 2009 retreat. The event sought to advance caregiver-supportive policies across a broad range of perspectives.

After the retreat, government representatives began sorting through the proposed action items, finding quick, inexpensive policy wins that demonstrated the government’s support for the issue. Says Ellen: “When government is nearing the end of a term, its members tend to focus on completing things that are already in the works. OCC has to learn to demonstrate where caregiving ‘fits’ the current provincial agenda.”

Ellen has seen a steady improvement in OCC’s advocacy work since 2009. Its policy briefs are now more focused and broken into smaller pieces. Pre-budget consultations include both bureaucrats and politicians, and there is an appreciation of the need to continually influence the government’s future policy platforms.

Says Ellen: “Learning how to prioritize is an art in itself. If you ask for too much, people turn away. If you ask for too little, the really important things you want may be left off the table. OCC has some strong early learners around Strategic Inquiry, but there is still work needed to gel the group.”

While the Strategic Inquiry model found a receptive audience in Ontario, other caregiving associations and coalitions across the country are at different points in their acceptance and adoption of the methodology. For some, it represents a significant challenge to the fundamental premise that government is an entity to be tamed, not trusted. Others find that their membership structures and government relations make advocacy work of any kind very difficult. Nonetheless, caregiving groups in British Columbia, Alberta, Manitoba, Quebec, New Brunswick and Nova Scotia continue to build their relationships with CCC, sharing content and expertise and respect for one another’s processes for advancing the caregiving agenda in Canada.



## *Lessons for coalition builders*

Canadian Caregiver Coalition partners believe that the organizational and advocacy lessons they have learned can be of use to any collaborative groups that seek to amplify their messages by multiplying their partnerships. Predicting and labeling the pitfalls associated with group work may not solve the problems, but they can validate the experience and point a way forward.

### *Virtual organizations – old wine in new skins?*

One view of virtual organizations is that they make a virtue of poverty; they are not a significant departure from the usual “make time for this job from the side of your desk” approach to advocacy work traditionally used by nonprofit groups. Not surprisingly, it is the organizations that make a firm commitment to caregiving – by providing adequate time and resources – that are most able to participate in coalition efforts.

### *How quick can you be?*

Advocacy messages sometimes need rapid response, otherwise opportunities can be missed. Having a flexible strategy in place that allows members to ‘opt in’ to messages is vital – both for an organization’s reputation and to ensure message clarity and acceptability to all collaborators.

### *People are people*

No matter how hard they try to take the high road and stick to messages that serve the advocacy goals of the collaborative, individual partners will try to advance their own agendas. Previously mentioned, the lesson about holding back for the good of the group can be shared among coalition members (“the policy needs of the many outweigh the needs of the few, or the one”). Once surfaced, the positives and negatives of the breakaway approach may help deter would-be mavericks.

### *Group chemistry*

Some partners will work better together than others; recognizing where energies and interests overlap and create successful outcomes is important. These winning combinations will change over time.

### *Too big, too unwieldy*

When organizations get big, they get bureaucratic. Building a group lends more weight to policy positions, but how does a coalition ensure that all of the members are engaged and sufficiently informed of the advocacy work? CCC’s signatory partners represent a large number of caregiving bodies and its members wear many hats. The 42 partner organizations have agreed that the signatory body may act as the nimble, just-in-time shaper of the federal government advocacy asks. Organizational hats are removed and signatory partners work for the group as a whole, achieving a high degree of synergy.

## ***Messages***

Collaborations must learn to craft overarching message strategies – umbrella statements – that can be used by individual organizations in their own communication efforts. Opting in or out of a particular set of messages allows groups to break and re-form, as appropriate, without having to relinquish membership in the group.

### *Too many messages*

A corollary of the too-large-a-group question is the difficulty associated with paring down a large number of messages. Part of the answer may lie in identifying which government departments are responsible for particular policy elements and shaping messages accordingly.

### *Key message definition*

How does a group ensure that the advocacy positions it articulates allow buy-in by all members? The speaking body may find itself retreating to the highest message, which may be too non-specific to effect any change. CCC learned develop a menu of messages from which partners could pick and choose, while holding true to core messages that all could agree upon.

### *Nuanced messages*

As both sides – government and coalitions – continue to learn more about one another’s views, they can better recognize the covert conflicts that may exist among groups and look for promising compromise positions.

### ***Faster alone, farther together***

As CCC has undertaken several rounds of Strategic Inquiry, it has built greater trust among partners and government bureaucrats and politicians. Each successive Throne Speech and Budget is an opportunity both to deepen understanding of government constraints and positions and to advance understanding of CCC asks.

## ***Future work: Maintaining the momentum***

For Nadine Henningsen, the experience of working with CCC through its recent evolution has been both a privilege and a challenge. Inspired by Holling and Gunderson’s “panarchy concept” through which many organizations have been encouraged to embrace the processes of change and re-birth, CCC has emerged with a renewed structure and approach [Holling and Gunderson 2002].

Says Nadine: “The CCC has been a living laboratory that has allowed me, my colleagues, other partners and social innovators the opportunity to witness and participate in a vital growth process. Our success in the recent federal election – where caregiving featured in all major party platforms and was a key election issue – clearly shows what can be achieved when you

dare to embrace new ideas, challenge the status quo and trust the combined energies of many committed organizations.”

Nadine hopes that by the time CCC’s current three-year Advocacy Plan is completed in 2012, its messages will have been so well seeded in so many different organizations that the coalition will have become redundant. She has challenged the signatory organizations to consider that possibility. Says Nadine: “CCC exists as a catalyst – an entity that influences policy and precipitates change. When we hear many partners passionately engaged in the caregiving conversation, our goal will have been achieved.”

*Anne Makhoul*

*Anne Makhoul coordinates the production of the Caledon Institute’s ‘community stories’ series.*

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## **Endnotes**

1. Four partners – the McConnell Foundation, the PLAN Institute for Caring Citizenship (Vancouver), the MaRS Discovery District (Toronto) and the University of Waterloo collaborate in the Social Innovation Generation (SiG) initiative to develop, encourage and support continuous social innovation. Their collective goal is to identify, test and share new approaches to addressing entrenched social challenges facing Canadians. <http://www.mcconnellfoundation.ca/en/programs/social-innovation-generation>
2. Sean Moore has established an Advocacy School ([www.advocacyschool.org](http://www.advocacyschool.org)). Its purpose is build Strategic Inquiry capacity among the nonprofit sector by getting members to teach one another the requisite skills. He sees this as a way to make SI training more affordable and believes that this type of capacity building is part of building a civil society.
3. Strategic Inquiry typically focuses on five dimensions of an issue, as seen by the “target(s)” of one’s advocacy activity:
  1. Public-Policy Context: How are decision-makers and advisors in government viewing this issue? What do they think they know about it? What/who are the principal influencers on this issue? In what context is the issue being considered – or not?
  2. Positioning: How does the issue fit into target government’s (or individual’s) priorities and lexicon? How does your issue link to others on the target’s agenda? What language/lexicon is used by those in government?
  3. Process: Which individuals and processes are most directly involved in handling of the issue? What are the relevant time frames?
  4. Precedent: In the target’s view, what administrative, policy or legal precedents are most relevant to your issue?
  5. Politics: What are the small “p” and big “P” political dimensions of the issue? [Moore 2011]

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