

# Citizen-Led Sustainable Change

*Innovations in North American Community Development*

St. Francis Xavier University Extension Department and Coady International Institute

June 23 - 25, 2013



## Forum Report

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# **Citizen-Led Sustainable Change: Innovations in North American Community Development**

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## **Forum Report**



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## INTRODUCTION

Throughout North America, there is a growing awareness of a profound shift in relationships between different social actors — governments, donors, private sector organizations, and communities — that is occurring amidst a crisis of public funding, growing inequality, and increasing environmental concerns. People across the political spectrum in both Canada and the United States are wondering: what kinds of action should citizen groups be undertaking and what types of partnerships with governments and the private sector should be forged to ensure the creation of an economic system that would embrace equity and environmental sustainability as core imperatives? It is clear that the time has come for a broad action-focused conversation aimed to provide information, insights, and practical ideas for citizen-led sustainable change.

The forum, “Citizen-Led Sustainable Change: Innovations in North American Community Development,” held at St. Francis Xavier University in Antigonish, Nova Scotia on June 23-25, 2013, was specifically designed to create the opportunity for such conversation. Co-hosted by the StFX Extension Department and Coady International Institute, it brought together nearly 150 development practitioners, researchers, policymakers, and funders from across North America to explore 11 remarkable cases of citizen-led innovations that are helping shape a new economy. Following case study presentations, participants explored insights and questions generated by the case studies further by joining thematic discussion groups. The “innovations marketplace” gave participants an opportunity to showcase their innovative tools, methods, and approaches — offering hands-on impressions of what is working in other communities. During the panel discussions and plenary sessions, participants shared their learnings and ideas for putting their learning into action.

The forum buzz was immediately disseminated through Twitter<sup>1</sup>. There were 321 tweets from 66 individual contributors that included the hashtag #citizenXchange during the forum and the five days that followed. The estimated reach was 64,248 Twitter accounts. Based on the number of followers connected to those accounts, the overall exposure to the forum Twitter activity was 270,641 impressions. The most retweeted message from the forum provides a succinct expression of the spirit that prevailed among its participants: “The world’s next superpower will be the civil society.”

The forum was supported by an Anonymous Donor, the Ford Foundation, the George Topshee Memorial Fund, and the J.W. McConnell Family Foundation. The Kettering Foundation also provided funding to document the key learnings.

## FORUM OBJECTIVES AND KEY QUESTIONS

The forum sought to meet three major objectives and address seven key questions:

### Objectives

1. Provide an opportunity for development practitioners, policymakers, and citizens to share experiences about citizen-led innovation through case study presentations, workshops, and open discussion
2. Lay the foundation for a shared understanding of citizen-led innovation as a basis for further conversations
3. Identify mechanisms for ongoing discussion, learning, and reflection beyond the forum.

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<sup>1</sup> In the days leading up to the forum, Coady Institute and the StFX Extension Department agreed on the use of #citizenXchange as the hashtag to be associated with all Twitter activity before, during, and after the event.

## Key Questions

1. What does it take for citizens to become engaged in community development process?
2. What innovative partnerships between public, private, and civil society actors are emerging to embrace citizen-led development?
3. What is the role of local leadership in making innovative and sustainable development happen?
4. What are the internal and external conditions that support community mobilization and agency?
5. What challenges and value-related conflicts do community leaders articulate?
6. How do communities understand and measure successful development?
7. How are community-driven initiatives sustained over time and how are successful innovations taken to scale?

The forum provided ample opportunity for exploring these questions in a dynamic environment that included case study sessions, thematic discussions, context-setting and synthesis plenaries, and semi-formal panel discussions, as well as hands-on workshops and an innovations marketplace.

## CASES AND COMMUNITIES

Eleven cases of citizen-led, community-based development were researched and documented and profiled at the forum:

1. Humility and audacity: The story of Vivre Saint-Michel en Santé, Montreal, Québec
2. Everyday good living: The Ontario Federation of Indian Friendship Centres
3. A vision of flipping the iceberg of power: The Greater Edmonton Alliance faces big land and big oil, Alberta
4. Ecotrust Canada: Building the conservation economy, British Columbia
5. “The people can do for themselves”: New Dawn Enterprises, Cape Breton, Nova Scotia
6. A quiet movement: Inuit self-determination, Arctic region
7. Citizen-led sustainable change: The case of Sandhills Family Heritage Association, North Carolina
8. From the fringe to the mainstream: Rural Action’s pursuit of a sustainable economy in Central Appalachia
9. Resident ownership and neighbourhood transformation: The Village at Market Creek, San Diego, California
10. A PUSH story: Citizen-led action for sustainable housing in a local green economy, Buffalo, New York
11. The Deep South Wealth Creation Network, Mississippi and Alabama. Each case was presented by people from the organization as well as by case study writers, which reinforced the collaborative spirit at the forum.



## FORUM STRUCTURE

The key components of the forum program were:

1. Background and context:
  - a. Setting the context: Why here? Why now? A “kitchen table” conversation about the history of the Antigonish Movement, its proliferation and its resonance and relevance today
  - b. A panel discussion about the changing context of citizen-led sustainable change
2. Case studies — presentation and identification of key themes:
  - a. Presentation and discussion of the 11 case studies
  - b. Reflections on the case studies and synthesis:
    - i. What excites us?
    - ii. What are the key challenges?
3. Deepening our analysis — emerging themes and challenges:
  - a. Exploration of key themes and challenges emerging from the cases and discussions
  - b. So what? Reflections on citizen-led sustainable change: A participatory synthesis
  - c. Now what? Putting our learning into action



In addition, the forum featured several important events:

- A public presentation on “Citizen-led sustainable change: Making a difference”, chaired by Gord Cunningham, Assistant Director of Coady International Institute; and featuring Sheila Watt-Cloutier, Past Chair of Inuit Circumpolar Council; John McKnight, Co-Director of the Asset-Based Development Community Development Institute and Professor Emeritus of Communications Studies and Education and Social Policy at Northwestern University in Evanston, IL; and Wayne Fawbush, Program Officer with the Economic Opportunity and Assets Unit of the Ford Foundation. This presentation was held in the community of St. Andrews, itself an example of citizen-led community development, and was accompanied by tours of two of the community facilities developed by its members.
- An innovations marketplace, featuring cutting-edge approaches, methods, and hands-on tools used in citizen-led development. This event provided a space for forum participants to present or learn more about innovations used in other communities to foster citizen-led sustainable development, and was delivered in two concurrent formats: (a) over a dozen “open market” kiosks where forum participants could browse displays; and (b) 12 workshops where the forum participants could take part in a deeper discussion of specific approaches or tools.
- A closing dinner and barn dance at St. Francis Xavier University’s retreat, Crystal Cliffs, which provided the participants with a further opportunity to experience Maritime hospitality and connect with each other in an informal and friendly atmosphere.



## A KITCHEN TABLE CONVERSATION: WHY HERE? WHY NOW?

This event, which took place in an informal atmosphere of the pre-forum dinner, reenacted the spirit of “kitchen study clubs” that were a distinctive feature of the Antigonish Movement in the 1930s. These clubs typically met in community members’ homes and schoolhouses, with the goal of exploring various subjects of local concern (such as household economics, farming and fishing techniques, business organization, or credit unions) through discussing the relevant materials provided by the StFX Extension Department. From these discussions, ideas for taking initiative to address community concerns emerged giving rise to the cooperative movement in the Maritimes and beyond.

The event also honoured the 85th Anniversary of the founding of the StFX Extension Department. An informal kitchen table conversation, featuring past and present members of the StFX Extension Department, helped ground the forum in the historical tradition of citizen-led development associated with the Antigonish Movement, and highlighted the continuing relevance of its vision of change “from within” to addressing the prominent social issues in today’s North America.



## THE CHANGING CONTEXT OF CITIZEN-LED SUSTAINABLE CHANGE IN NORTH AMERICA

This panel discussion, chaired by Alison Mathie of Coady International Institute, was intended to set the stage for the forum, and case study discussions in particular, by reflecting on the context for citizen-led social innovation in today's North America. The panelists included Sylvia Maracle, Executive Director of the Ontario Federation of Indian Friendship Centres; Rupert Downing, Executive Director of the Community Social Planning Council of Greater Victoria; and Dayna Cunningham, Executive Director of MIT's Community Innovations Lab. They observed that the forum is taking place during a period of intense change. We live in a time when financial and economic instability has become a constant, when the effectiveness of government as the provider of goods and services is increasingly called into question, when individuals and communities across North America and all over the world are becoming more and more vulnerable to the effects of environmental degradation brought about by industrial and technological development. "Everything is in a state of flux, and one of the advantages of a state of flux is that 'cracks' appear in the system, which social innovators can exploit" (Alison Mathie).

As the cases selected would demonstrate, innovations showcased at the forum are about how we can do things differently. "We are seeing an increasing number of citizen-led initiatives to 'take back the economy', to make it more people- and community-centred, and to take an ecosystem-based approach that integrates social, economic, and environmental sustainability" (Rupert Downing). Dayna Cunningham provided an illustration of emerging policy spaces that community innovators in the United States can now take advantage of. Specifically, she spoke about a key feature of Obamacare — moving away from trimming individual illness to maximizing community wellness — and indicated how this policy shift "creates a tremendous incentive for hospitals, governments, and other stakeholders to promote community-engaged planning for comprehensive wellness." An important theme raised during this session was that in order for these emerging social initiatives to take hold, we should "rewire ourselves" (Sylvia Maracle) — shifting from the deficit perspective to looking at the changes we want through the lens of self-reliance and self-determination.



## HUMILITY AND AUDACITY: THE STORY OF VIVRE SAINT-MICHEL EN SANTÉ

**Case study writer: Brianne Peters**

**Presenters: Brianne Peters, Jean Panet-Raymond, Eve-Isabelle Chevrier**

**Facilitator: Shelagh Savage**

### SUMMARY OF THE CASE STUDY

This case study documents the recent history of Saint-Michel, one of Montreal's oldest suburbs. Since 2004, a local citizen-led organization named Vivre Saint-Michel en Santé (VSMS) — “For a Healthy Saint-Michel” — has been implementing an innovative urban and social revitalization strategy that has rebranded a neighbourhood once known for its high crime rates, poverty, and lack of services into one that is known for its active and unified citizens and coordinated action. Today, Saint-Michel boasts dozens of self-initiated committees, associations, and round tables (action groups) that bring together people of different ethnic groups and backgrounds to address issues related to poverty, income, employment, housing, security, culture, sports and recreation, neighbourhood beautification, and education. The work of these groups has complemented the increasing number of social services that have been established in the neighbourhood by the government. As a result, a once highly transient population has begun to stabilize and newcomers to Saint-Michel are increasingly choosing to settle there.

VSMS has deliberately sought out resources to support citizen participation, which was not an easy task in a transient and diverse neighbourhood with widespread poverty. In addition, while many San-Michel residents had been activists in their countries of origin, they had little experience in community-building and civic leadership in the Canadian context. However, VSMS has introduced practical processes intended to gradually move citizens from acting as individuals (“I”) to acting as a group (“US/WE”) to acting as a neighbourhood (“TOGETHER”). VSMS has created the spaces and provided the resources for San-Michel residents to learn democracy through practice in a fun and vibrant environment.

The changes VSMS has catalyzed have been gradual. Its real innovation lies in the process of stimulating and supporting citizen engagement in a population that has not always been recognized as citizens. VSMS has demonstrated that community organizing, as a concept, can be quite simple. It does not take years of education to understand. Nor did it, in this case, require a rich natural resource base, political clout, adequate physical infrastructure, or financially stable population or institutions. However, it did take people with experience, patience, and passion, both inside and outside the neighbourhood, who were willing to invest in a deliberative process over the long term, oftentimes above and beyond what the resources at hand could pay for or what their job descriptions could possibly capture.

The story of VSMS is a story of creation, collaboration, sacrifice, compromise, and at times confrontation. This story offers practical lessons for organizations working in urban, multi-cultural contexts. It also provides an interesting window into a hybrid model of organizing strategies, originating both from Quebec — a province that historically has had to act in solidarity to uphold its own heritage in Canada — and from around the world.

## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- A seemingly simple process of relationship building within a diverse and (initially) highly transient community, leading to social change
- Intentional strategy for building collaboration among a diverse population
- A process to gradually and deliberately move citizens from acting as individuals (“I”) to acting as a group (“Us/We”) to acting as a neighbourhood (“Together”)
- Common goals including replacing the perception of Saint-Michel as an undesirable place to live (“the garbage can of Montreal”) with the image of an active and unified community, which takes charge of its affairs and also contributes to the vigour of Montreal.

### The key factors that contributed to the success of VSMS:

- VSMS’s philosophy embodies a fruitful combination of audacity to tackle complex issues (such as poverty, housing and services availability, or integration of immigrant groups, to name a few) and humility — the willingness to listen to, learn from, and work with diverse resident groups and other stakeholders
- VSMS activists have shown commitment to a common agenda in the face of a diversity of interests
- VSMS leaders are dedicated to continuously invest time and other resources in the process of building relationships and identifying common goals. (Door-to-door canvassing is their “signature approach.”)
- VSMS has developed equitable partnerships characterized by common goals and shared power
- VSMS carries out an ongoing evaluation of its initiatives to ensure that they are worth the effort and is open to changing its tactics as required
- VSMS uses cultural forms that capture imagination (e.g., theatre, poetry, rap) as tools for citizen engagement.

### The challenges:

- Balancing professionalization of community development work with citizen-led action
- Maintaining the energy, passion, and community ownership of the development initiatives
- Ensuring that community ownership doesn’t prevent the residents from being open to change
- Forging stronger partnerships with local businesses (such as Cirque du Soleil)
- “Compromising collaboration” (accepting support from large outside organizations smacks against grassroots community organizing)
- “Conflictual cooperation” (sometimes you have to fight with your partners when disagreements arise)



## EVERYDAY GOOD LIVING: THE ONTARIO FEDERATION OF INDIAN FRIENDSHIP CENTRES

**Case study writer:** Linda Jones

**Presenters:** Linda Jones, Sylvia Maracle

**Facilitator:** Sheila Isaac

### SUMMARY OF THE CASE STUDY

In Canada, 70 percent of the Aboriginal population currently resides in urban centres. Friendship Centres were created to help First Nation, Inuit, and Métis people adjust to an urban environment by maintaining their sense of cultural identity while seeking employment or education. The story of the Ontario Federation of Friendship Centres (OFIFC) — a non-profit organization representing the collective interests of 29 member centres located in towns and cities throughout the Province of Ontario — is a story of the coming together of urban Aboriginal people; it is a story of healing and it is a story of returning Aboriginal people to themselves. For the OFIFC, returning Aboriginal people to themselves means creating the space for “everyday good living” — the OFIFC’s definition of culture. Everyday good living places the emphasis on one’s interrelation with others in a spirit of trust, friendship, and respect. Everyday good living reflects wholeness and peace, and living in balance with the natural and spiritual worlds. It is this everyday good living that was all but destroyed through the atrocities of colonization and assimilation, contributing to maladaptive behaviours and urban migration, and resulting in the need for Friendship Centres and services grounded in Aboriginal culture.

The OFIFC has been instrumental in furthering the healing movement for Aboriginal people in Canada. The cultural idea of healing — achieving balance and wholeness — is the central principle that OFIFC programs and services are organized around. In the case of OFIFC, the story of healing cannot be separated from the story of Aboriginal women’s leadership, and the critical role that women have played in the Friendship Centre movement. This represents another aspect of Aboriginal cultural heritage — the balance between female and male. In pre-contact Aboriginal life, the two genders had different spheres of responsibility that complemented one another. This case study highlights the leadership and contribution of one woman in particular, Sylvia Maracle, the current and long-time Executive Director of the OFIFC who has played a pivotal role in mobilizing the healing movement and unifying disparate Friendship Centres into a force for change from the individual and community levels to the empowering environment. Indeed, through the growth in the number of the Friendship Centres, their programs and outreach, and the role that the OFIFC takes in engaging with a range of partners, the healing has not been among Aboriginal people alone. We observe changing attitudes in mainstream society, not only about how to engage with Aboriginal people, but also about the value of an Aboriginal worldview and how this can contribute to a broader understanding of harmony and peace in our common future.

Fundamentally, this case study is about us all — for in the infinity of creation, the dividing line between Aboriginal and non-Aboriginal is an illusion, and the violence committed by one against the other is a violence that destroys us all. This case teaches us that we must all learn to live in gratitude, trust, friendship, and respect — in balance with our natural and spiritual world — to achieve everyday good living for our children and their posterity.



## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- The notion of culture as “everyday good living” adopted by the OFIFC: “It means every day your physical, mental, emotional, and spiritual needs will be taken care of, and that makes you a whole person” (Sylvia Maracle)
- The style of leadership that the OFIFC relies on. “There is a mainstream notion of leadership where the leaders are an apex, they have all the power, and the people are way down there,” says Sylvia Maracle. “But we refer to our leaders as ‘the ones who carry the bones of our people.’ They are responsible for the bones of our ancestors they put in the ground, they are responsible for the babies in arms, they are responsible for people who have ability and support needs, and they are responsible for the very old who need our arms to move forward. A really different style of leadership: to be responsible, not to just shine the star, but to support people moving towards it.”

### The key factors that contributed to the success of the OFIFC:

- The OFIFC provides a home (rather than being merely an institution) for urban Aboriginal people
- The OFIFC is showing the capacity to generate its own income (through consulting and lectures, which are expected to generate seven million dollars in 2013)
- The big role that women play in the OFIFC, including the stability that Sylvia Maracle has brought to the Friendship Centre Movement over the three decades of her leadership
- Dedication to promoting youth engagement and leadership: 25% of people who sit on the OFIFC Board of Directors are under 25 years of age. The OFIFC has specific programs for young people, such as WOLF (“Way of Life Forever”), a cultural camp that provides Aboriginal youth living in urban areas an opportunity to engage in land-based activities
- The OFIFC has developed specific programs for Aboriginal men, including Kizhaay Anishinaabe Niin (“I am a kind man”) initiative. The OFIFC has already trained over 700 men to act as community facilitators and role models in this initiative. Over time, the initiative has moved into a new phase dubbed HIM (Healthy Indigenous Masculinities), which is focused on unlearning historical stereotypes about men’s roles
- OFIFC programming cuts across all aspects: parenting; early childhood education; health and wellness; prevention of violence against women; housing; men’s identity, youth engagement, etc.

### The challenges:

- “We need to be careful we don’t dispirit people by telling them how to live.” (Sylvia Maracle)
- Success can be a challenge. (OFIFC leaders acknowledge that as the numbers of Aboriginal people on the healing path increase, there will be questions about the role the organization should play after the “healing phase” is completed.) Some Aboriginal thinkers such as Calvin Helin or Tom King offer potential next steps. For Calvin Helin it is economic development; for Tom King it is, at least in part, educating non-Aboriginals so that they understand Aboriginal history and the reason for events such as the Idle no More Movement.

## A VISION OF FLIPPING THE ICEBERG OF POWER: THE GREATER EDMONTON ALLIANCE FACES BIG LAND AND BIG OIL

**Case study writer:** Elizabeth Lange

**Presenters:** Elizabeth Lange, Shanthu Mano, Elizabeth Metcalfe

**Facilitator:** Olga Gladkikh

### SUMMARY OF THE CASE STUDY

Greater Edmonton is a metropolitan area with a population of over 1 million people, located in the Canadian Prairies. The area is a major hub of the oil and gas industry. The Greater Edmonton Alliance (GEA) — a coalition of over 40 institutions, including faith groups, professional unions, various community and ethno-cultural organizations, and small businesses — emerged in 1997 in response to neoliberal government reform (dubbed “The Klein revolution”), which profoundly reshaped the relationships between the public and private sector and civil society.

GEA founders deliberately adopted Alinsky-style organizing model. Core organizers from inner city, union, local neighbourhood, and aboriginal community settings first explored the characteristics, strategies and formation of broad-based organizations. They then fanned out to do “relationals” — individual meetings with a wide range of people who in turn did their own relationals, building a network of citizen power in the city. An important purpose of these steps was to identify people who were moderates, had large informal social networks, would be effective public leaders, and could bring in the support of their organization. Regional and national leadership training was provided by the Industrial Areas Foundation for all members, with the goal of strengthening organizational life in member organizations. GEA’s leadership training is aimed at teaching local activists to master the key elements of its tactics: (a) research an issue; (b) speak publicly on this issue; (c) do a power analysis related to the issue; (d) take disciplined actions that have a chance of winning; and (e) conduct a candid evaluation of the actions taken. As the alliance grew, the need for paid leadership became more urgent. A windfall donation made it possible to hire leaders who could attract dues-paying institutional partners. The organizing momentum led to a Founding Convention in May 2005, with over 1,000 individuals and 50 institutions attending, including the Mayor and other city councillors. The publicly launched GEA would double the number its dues-paying members over the next five years.

A multi-sector and multi-issue organization working across many facets of diversity, GEA has achieved significant policy changes, particularly related to affordable housing and the creation of a comprehensive local food strategy. It has spawned a spin-off social enterprise that addresses local sustainability through green retrofits of existing housing stock, contributing to the municipal goal of a carbon-neutral city. Most importantly, GEA has contributed to a shift in the public’s political and environmental consciousness. Through exemplary leadership training, it has fostered much higher levels of civic engagement, holding government and private sector leaders accountable to citizens.



## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- The willingness and ability of GEA leaders to bring together diverse groups of stakeholders to collaboratively resolve issues impacting the community at large
- The diversity of issues that GEA has addressed
- GEA's work brings the civil back to civil engagement
- Use of one-on-one relational meetings to engage residents
- Focus on grassroots conversations as the primary drivers of policy change
- Use of "multipliers" (residents with extensive networks of contacts, e.g., blog writers) to help unite people around issues of concern
- Use of controversy to spark authorities' attention
- A spin-off social enterprise ("C>Returns") spawned by GEA in 2012 with the intent of helping homeowners "see returns" of green retrofits of existing housing stock in terms of community revitalization, carbon savings, cash savings, comfort, and increased resale value. (While contributing to the city's zero carbon vision, C>Returns is also injecting millions of dollars into the local economy and providing an avenue for GEA organizing among community leagues.)

### The key factors that contributed to the success of GEA:

- GEA's work is focused on initiating concerted action based on "listening campaigns" that help identify the burning issues
- GEA's emphasis on the quiet, behind-the-scenes relationship building has created a web of citizen power that becomes boldly visible at times, showing the passion and brilliance of ordinary people to create systems-level change
- GEA has a deliberate strategy of building leadership for collective action
- GEA's adherence to continuous leadership training and power sharing has enabled it to build and sustain the "passion capital" among the residents who share its vision.

### The challenges:

- Aligning the interests of diverse stakeholders (including big business, state, labour unions, and various community groups), especially when their interests are not aligned in an obvious way, may present a challenge. Further, in GEA's case this challenge may be exacerbated by its reliance on Alinsky-style organizing, which is known to favour confrontational tactics — using conflict as a means to generate a "space of tension" conducive for change.
- Creating and maintaining common ground between working-class and well-to-do middle-class stakeholders
- As an organization that relies primarily on member dues to fund its operations, GEA may face a tension between the task of maintaining or expanding its membership base to secure its funding needs and the task of building the members' sense of engagement with its work
- Dealing with Big Oil and Big Land requires deeper understanding of spaces where power operates.



## ECOTRUST CANADA: BUILDING THE CONSERVATION ECONOMY

**Case study writers: Gord Cunningham, Juliet Merrifield**

**Presenters: Gord Cunningham, Brenda Reid-Kuecks, Devlin Fernandez, Jacqueline Koerner**

**Facilitator: John McKnight**

### SUMMARY OF THE CASE STUDY

Ecotrust Canada (EC) is an enterprising nonprofit based in British Columbia, whose work is guided by a big idea — that it is possible to have economic development that builds social equity and rebuilds rather than degrades the environment. Born in 1994 into a heated debate between environmentalists and industry over the fate of old-growth forests in Clayoquot Sound, EC initially focused on two broad areas: mapping for information democracy and decision-making, and supporting enterprises with a conservation economy approach. Mapping enabled EC to build relationships of trust with many First Nations and non-Aboriginal communities across coastal BC, uncover community knowledge and visions, and support a sense of community agency. Yet EC leaders always saw that maps don't stand alone but are part of the process of shifting the ground towards the conservation economy, enabling communities to see they have assets and to think about how they want to use these assets.

Parallel with the mapping work, EC developed a business support strategy to help communities realize their visions. Its key element was the Coastal Loan Fund that brokered technical expertise and new forms of capital to businesses that incorporated environmental and social practices conducive to the conservation economy. Over its ten-year existence, the Fund provided 87 mission-related loans, disbursing \$10.7 million and leveraging an additional \$40 million in loan capital. EC estimates that these loans have created almost 900 jobs.

In the years between 2005 and 2010, EC began to branch out into projects aiming to demonstrate another way of doing business. Shifting from support to action, in 2005 EC brokered over \$1 million to purchase the Trilogy Fish Company, one of the last remaining fish processors on the Tofino waterfront and the only place on that section of the BC coast to sell fresh, locally caught seafood. This more direct involvement in enterprises subsequently spread to sawmills, fishing license banks, managing forests, and an enterprise to help businesses measure, reduce, and offset their carbon emissions.

The global financial crisis of the late 2000s provided both challenges and opportunities for EC to demonstrate the conservation economy in action. Some of its initiatives had to be closed (such as the Coastal Loan Fund) or were hived off. Other opportunities opened up as the financial crisis generated a public searching for new economic models. One of the most promising is ThisFish, a traceability tool to map seafood from the boat to the plate that has the potential to be expanded to other commodities and to redefine the relationship between producers and consumers. Another initiative EC is “incubating” is a forest carbon sequestration project in a community forest “that will document carbon stored in the forest, link this stored carbon to the company’s forest management plan, and take the carbon to market for sale. If successful, this initiative promises to open a whole new discussion in Canada about how to maximize and diversify revenues associated with forestland management.”

By working with communities to create their own stories about themselves and their future, EC makes the case for a different approach to the stewardship of natural resources, for collaborative associations of producers, and a new type of entrepreneurship integrating and balancing economic development, environmental protection, and social equity.

## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- This case powerfully demonstrates that “the economy is a tool, not a beast we have to feed. It can be redesigned to get what we want” (Brenda Reid-Kuecks)
- EC’s work offers an experiential guide for building the triple bottom line (“people, planet, and profit”) — an economy of balance between making money, environmental stewardship, and social equity
- Transferability: EC’s ideas have been used by others (e.g., by Ecology Action Centre in Nova Scotia).



### The key factors that contributed to the success of EC:

- EC focuses on building relationships of trust (with local communities) that will sustain change
- EC is committed to working “deeply in place on a consistent basis” (Jacqueline Koerner). More than half of its staff are based in communities
- EC is a very refined organization, boasting a diversified team: “We have mappers, sector experts in forestry, fisheries, renewable energy. We have finance and business people that know how to make it succeed over time. We have facilitators, community development practitioners who are able to hold space for communities” (Brenda Reid-Kuecks)
- EC has “longtime directors and research shows these are healthy because they provide the institutional memory. [At the same time,] we keep asking who else should be at the table so we don’t become a club” (Jacqueline Koerner)
- EC conceives of its work as “a marathon, not a sprint” (John McKnight). “We want, not little one-off projects, but transformative change” (Devlin Fernandez)
- EC is “empowered by a philanthropic start which gives us a good running ramp” that small businesses don’t have. Ideas can be tested and their viability discussed with the board and with funders.(Brenda Reid-Kuecks)
- Saying “no” to projects that are no longer viable in a respectful way.

### The challenges:

- Balancing long-term commitment to communities of people and place with what it takes to bring innovations to scale
- Remaining responsive to ideas that come out of place-based work but requiring possibility of scale and market transformation
- Encouraging experimentation and risk-taking but also demonstrating proof of concept
- Finding a financial model that will work across the entire spectrum of social finance needs — from incubation to scaling
- There is a tension between EC’s governance structure, which is driven from the top, and its mission, which is driven by “the assets, opportunities, and people on the ground” (Devlin Fernandez)
- Regulatory environment: in Canada a nonprofit’s ability to engage in social enterprise is very limited.

## NEW DAWN ENTERPRISES: “THE PEOPLE CAN DO FOR THEMSELVES”

**Case study writers: Anne Toner Fung, Juliet Merrifield**

**Presenters: Phil Davison, Rankin MacSween**

**Facilitator: Colleen Cameron**



### SUMMARY OF THE CASE STUDY

New Dawn Enterprises was founded in 1976 in Cape Breton with a vision to be a “community instrument through which the people can do for themselves.” Based in the poorest area of one of Canada’s poorest provinces, it has grown into a network of 19 companies spanning real estate, health care, vocational training, and social development sectors. Taken together, they employ 325 people full- and part-time. New Dawn’s origins can be traced back to the Antigonish Movement of the 1930s and ’40s, which relied on adult education, credit unions, and co-operatives to help small communities around Canada’s Maritimes improve their economic and social circumstances. In a similar vein, New Dawn has focused on creating enterprises aimed at building multiple forms of community wealth rather than private profit.

First, New Dawn invested in real estate — the built capital of affordable housing projects such as Pine Tree Park Estates, a \$3.5-million redevelopment of a former military radar base for residential and commercial use catering especially to seniors and people with disabilities. Second, it engaged in creating financial capital through Community Economic Development Investment Funds, which provided the funds for the initiatives the organization has become known for.

Third, New Dawn’s leaders understood that these two forms of wealth were not enough, and that they also had to engage in building individual capital — helping enhance the stock of skills of people living in the area and meeting their health needs. One example of this engagement was the establishment of New Dawn College to provide vocational training in the areas its parent company was concerned with (such as the Continuing Care Assistant Diploma Program, launched when New Dawn developed its Health Care Services, including home care and a 30-bed residential facility in Pine Tree Park Estates).

Fourth, New Dawn’s commitment to community building required development of social capital — the relationships and networks that support healthy communities. Much of New Dawn’s own social capital has been created by virtue of involvement with large numbers of local residents through the services it provides. The other part of its social capital is made up by the pool of people connected to New Dawn through the partnerships it has established with other organizations throughout its long history.

Finally, New Dawn has recently become visibly involved in political capital building, initially through its engagement in public debate regarding the future of the Port of Sydney and subsequently through the publicity associated with its president’s running for mayor of the Cape Breton Regional Municipality.

Much of New Dawn’s work, like that of many social enterprises, has consisted of filling in the gaps in the social fabric that the market and state do not cover. Usually these areas provide too little profit for private entrepreneurs and are too difficult for the government to serve effectively. Only recently has New Dawn started to move into the mainstream economy. Throughout its history, however, it has been consistent in building “a new model of economic development; a model where the wealth created here stays here.”

## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- “Organic” nature of New Dawn: “You just have a sense of what you want to do in your heart . . . maybe we should have had a plan but we didn’t, we just didn’t. . . We have planning sessions and all that, but in reality you end up responding to the opportunities and challenges that are in front of you” (Rankin MacSween)
- The belief of New Dawn’s leaders that “the stories we tell about the dreams that we are imagining” are at the heart of any form of community wealth
- The principle of subsidiarity that guides New Dawn’s work: “In terms of the resolution of an issue, you deal with that issue as close to where the issue is as possible” (Rankin MacSween). In keeping with this principle, responsibility for the local economy rests with the local people. Accordingly, New Dawn has been raising money and investing it in the community (to date, it has paid dividends of \$630,000 to its investors).



### The key factors that contributed to the success of New Dawn:

- Insatiable optimism of New Dawn’s leaders: “Opportunity just abounds”
- New Dawn leaders have shown a “willingness to fail” (which enabled them to succeed where others may have been unwilling to take risks)
- Remembering mistakes and learning from them: “New Dawn makes mistakes but it only makes them once. And it remembers them. Unlike bureaucracies that have no memory and make the same mistake over and over again, community organizations have a memory, and I think that certainly speaks for New Dawn” (Rankin MacSween)
- Nova Scotia tax legislation (investors buying shares in local enterprises such as New Dawn get 35% provincial income tax credit on their investment).

### The challenges:

- “There is a tendency over time for organizations to turn inward, to turn their face away from the community. It’s more comfortable. To keep your face to the community is much more challenging, because people are going to question you, they are going to object to what you’re doing. This [tendency to turn inward] is a real danger with any organization as it grows and meets with some measure of success” (Rankin MacSween).
- Managing the tension between financial sustainability and a social vision
- Building multiple partnerships in the community, with government agencies and for-profit companies as well as other nonprofits, while maintaining autonomy
- How can universities again become a tool for change and innovation in areas such as Cape Breton?
- How can organizations such as New Dawn bring their success stories to a wider audience beyond the areas they work in, so that these stories could be replicated by other communities?
- How does building the confidence in people translate into building the confidence in the economy at large?

## A QUIET MOVEMENT: INUIT SELF-DETERMINATION

**Case study writer:** Linda Jones

**Presenters:** Linda Jones, Sheila Watt-Cloutier

**Facilitator:** David Fletcher

### SUMMARY OF THE CASE STUDY

In recent years, the Inuit have faced unprecedented challenges as the pace of climate change and cultural transformation has accelerated — in less than one generation, people have moved from largely autonomous hunting households living in scattered camps to settled communities that are globally connected and increasingly dependent on the South for their survival. The general attitude among the Inuit is that they will continue to adapt as they always have. However, statistics regarding incomes and poverty, mental health and youth suicide rates, school success, unpredictable weather patterns and hunting accidents reveal the extreme costs being borne by the Inuit people. When asked about the reputed Inuit adaptability, one Inuit interviewee posed the rhetorical question, “Why do the Inuit need to be so good at adapting? Inuit did not choose to live in settlements, go to residential schools, lose hunting grounds, or be affected by melting snow and ice. Rather, why can they not have greater control over the forces that are impacting their lives?” This case study examines this movement towards greater control — the unique coming together of dispersed Inuit communities in their efforts to achieve self-determination and livelihood security. This is a quiet movement that is based on the keen observation, resilience, and connectedness, and it is gradually taking hold and making itself heard.



The case highlights one aspect of the movement — the efforts to cope with unbridled climate change. This work is highly complex given the low population density in the Arctic, transnational habitation area of the Inuit people, and legal petitions made to national and international bodies that fall outside the boundaries of one or many of the petitioning groups. Sheila Watt-Cloutier of Nunavik has been at the forefront of climate change activism, and her contribution to the Inuit self-determination movement is specifically highlighted. In her role as International Chair of the Inuit Circumpolar Council from 2002 to 2006, she was instrumental in helping transform the way the world views climate change. She argued passionately that climate change is not just an environmental issue, but primarily a question of cultural survival and therefore of human rights. And she has long made the case that this is an issue for the entire world and not only for the Inuit: “We remain guardians of the natural environment. As we continue to navigate rapid social change, it seems highly appropriate that Inuit provide advice to the world on issues that affect the health of our planet.”

Geographically, this case study focuses on Nunavut, where Sheila Watt-Cloutier has been based throughout her work on climate change, and where most of the interviewees have grown up and still live. Moreover, Nunavut is the first self-governed Inuit territory that came into being in 1999 — providing political machinery for self-determination. During this time, climate change activism has expanded its scope from a historic legal petition that was supported by Inuit elders living on the land to include youth who are using social media to connect across the huge region they inhabit. Today, although there is greater contention in Nunavut about climate change owing to possible economic benefits related to the Arctic icecap melting, the concern around Inuit self-determination remains. And the baton is being passed as Inuit youth become active in key organizations and major international events such as the UN Summit on Climate Change, expressing their apprehensions and dreams via all kinds of social media.

## SUMMARY OF THE DISCUSSION

### **The most exciting aspects of the case study:**

- The “quiet movement” of the Inuit people has led to the recognition of climate change as a human rights issue — and that’s how we can collectively solve it
- Inuit storytelling provides a way to put a human face on big issues
- Exceptional ingenuity and adaptability of Inuit people.

### **The key factors that contributed to the success of Inuit “quiet movement”:**

- Inuit activists such as Sheila Watt-Cloutier have been able to put a human face on what was previously perceived by the majority as an “environmental issue”
- Inuit activists have been able to bring diverse groups from multiple countries together to acknowledge the risks of climate change and address them collectively
- Inuit activists have made good progress in raising awareness and appreciation of their hunting-based culture among outsiders. “We too have an affinity with our whales, that’s why we eat them. . . . When we see blood on the ice, it’s an affirmation of life, not a confirmation of death. It’s life giving life. That’s how we see it” (Sheila Watt-Cloutier)
- Inuit activists have had their confidence buoyed by the conviction that concerted action on human contributions to climate change is vital for maintaining the cosmic order.

### **The challenges:**

- “The world has come to understand the Arctic for its wildlife better than its people” (Sheila Watt-Cloutier). Animal rights activists, in particular, still fail to understand the Inuit way of life.
- In recent times, Inuit communities have been exposed to high levels of multiple life stressors, whose cumulative impact may reduce their coping ability: “I believe we are one of the most adaptable peoples on the planet. But adaptation has its limitations when you’re already in that vulnerable position of not being able to get up and catch that breath just as another swipe comes around” (Sheila Watt-Cloutier)
- The potential of Inuit ecological knowledge to play a vital role in climate change assessment has yet to be fully recognized and utilized.

## CITIZEN-LED SYSTEM CHANGE: THE CASE OF SANDHILLS FAMILY HERITAGE ASSOCIATION

**Case study writer:** Yogesh Ghore

**Presenters:** Yogesh Ghore, Ammie Jenkins, Cynthia Brown

**Facilitator:** Barbara Wyckoff

### SUMMARY OF THE CASE STUDY

This story, unfolding in the Sandhills region of North Carolina, demonstrates how cultural connection to the land can be converted into economic, social, and environmental benefits. The Sandhills Family History Association (SFHA) is one of the first African American organizations in the United States to combine land protection with community economic development, guided by the West African principle of Sankofa: “We must look back to go forward.”

The seeds of SFHA were sown when its founder Ammie Jenkins returned to her birthplace in the Sandhills, after spending 23 years living and working in the city of Raleigh. What started as a personal quest to learn about her family’s history soon became a broader endeavour to document the rich history of African American families in the region. Her conversations with the elders revealed one common thread: the deep connection of local African Americans to the land.

After slavery was legally abolished in the US in 1865, it became possible for the former slaves to become landowners. They had to work hard for many years as sharecroppers, tenant farmers, or industry workers to be able to acquire farms, yet the importance of land ownership for African Americans could not be overestimated: it meant economic security and self-determination. However, with the introduction of segregation laws and the racial and economic discrimination that ensued, African American landownership began to decline. Migration to cities seemed the only way out in the face of discrimination and predatory land purchases. The mass exodus of African Americans from the Sandhills was further accelerated by expropriation of land for the Fort Bragg, one of the largest military complexes in the world, which now covers 251 square miles and continues to expand.

Realizing that the loss of land inevitably led to a decline in traditional livelihood activities, diminished self-reliance, and the loss of African American heritage in the region, Ammie Jenkins brought together a group of local citizens sharing a common goal to reclaim their land, culture, and their sense of community. Thus was established SFHA, with the mission of building communities of HOPE through Heritage preservation, Outreach and community education, Protection of land and natural resources, and Entrepreneurship and economic development.

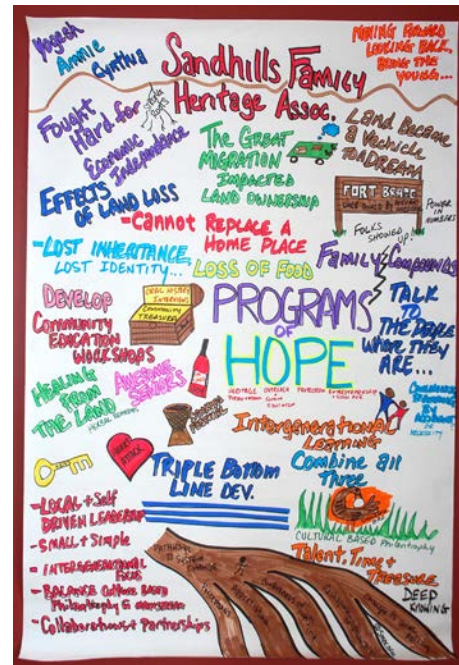
SFHA leaders call their work ‘cultural-based philanthropy’ inspired by the tradition of giving back, which was the hallmark of African American culture in the Sandhills during its “golden age” of land-based self-reliance, and which they seek to revive today. They aspire to bring systemic change by contributing to a “back to the land movement” for African Americans through education, community building, advocacy, and collaboration with multiple stakeholders. The success of their efforts is evident in the increased awareness of land owner rights and responsibilities among local residents; improved access to services; the expansion of land-based economic activities; and finally, through changes in local policies regarding land protection and economic development.



## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- SFHA's commitment to "reclaiming the past" and rebuilding a culture of self-sufficiency based on responsible land stewardship
- SFHA's focus on upholding cultural identity as key to the development of resilient communities
- SFHA's work provides an inspiring example of "culture-based philanthropy" rooted in the local tradition of giving back: "Here, if you see your neighbour hungry, you feed your neighbour. There is no such thing as people starving or wanting food because what I don't have, you have. It was inherent in [our] culture that you help your neighbour; it was a given" (Ammie Jenkins)
- SFHA's use of political capital to "rewire" the attitudes of both military and civil authorities regarding African American heritage.



### The key factors that contributed to the success of SFHA:

- Self-driven and local leadership: Most of SFHA's achievements have much to do with Ammie Jenkins's leadership prowess. Further, she has identified and nurtured self-driven leaders at the grassroots level through provision of training and mentorship in areas such as community organizing, asset mapping, communications, and conflict resolution.
- Reliance on Sankofa principle: Reaching back and gathering the best of what our past has to teach us in order to move forward
- Adherence to the "starting small/keeping it simple" approach has helped SFHA attain credibility and support among local citizens
- SFHA leaders are committed to initiatives that resonate with people of all ages
- SFHA leaders have built effective working relationships and partnerships with state and local government agencies, military authorities, churches, businesses, universities and colleges, and various non-profit organizations.

### The challenges:

- Developing a deliberate succession strategy to ensure that there is no leadership vacuum after SFHA's founder and key figure Ammie Jenkins steps down
- While SFHA adheres to the culture of giving ("culture-based philanthropy"), and most of its previous work has been accomplished by volunteers and through partnerships, increased demand for its programs and services entails the need for professional staff and, therefore, the need to secure financial and other resources — in amounts that may far surpass those it is used to managing.



## FROM THE FRINGE TO THE MAINSTREAM: RURAL ACTION'S PURSUIT OF A SUSTAINABLE ECONOMY IN CENTRAL APPALACHIA

**Case study writer: Alison Mathie**

**Presenters: Michelle Decker, Tom Redfern, Tom Johnson, and Alison Mathie**

**Facilitator: Robert Donnan**

### SUMMARY OF THE CASE STUDY

This case tells the story of Rural Action's (RA) roots in social and environmental activism, its evolution over several decades as a member-based nonprofit working with local communities to promote rural revitalization, and its more recent alignment with Ford Foundation's Wealth Creation and Rural Livelihoods Initiative. It is a story of championing causes to alleviate poverty and reverse the environmental damage caused by the coal industry, mobilizing a broad base of concerned citizens, and cultivating leadership to carry rural revitalization forward. RA has inspired innovations in local food production systems, sustainable forestry, watershed restoration, environmental education, waste management, and advocacy on local energy issues. It has moved from the fringes to a position of influence, a central node in a network of local initiatives that are weaving a sustainable economy.

RA's geographic area of focus spans one of the most distressed regions of the USA. Its history is intricately linked to the boom-and-bust cycles of an economy driven by demand for fossil fuels: first coal, then oil, and now shale gas. Cyclical losses of jobs gained have been a feature of the region's economic history, as have the devastating environmental consequences of these industries. In this context, RA has endeavoured to write a different economic story for the future of Central Appalachia, one that builds and preserves, rather than extracts and depletes, the stock of the region's wealth.

Strengthening its capacity to put ideas for a sustainable economy into action is at the heart of Rural Action's recent work with the Ford Foundation. The premise of this collaboration is that sustainable development requires growth of multiple forms of capital: financial, built, natural, social, intellectual, and political. The vehicle for this growth is the value chain, adding value locally in all forms of wealth. Producers, processors, traders, and consumers all rely on mutual solidarity for the system to work.

RA's programs in sustainable forestry, waste and recycling, and local food systems have lent themselves to value chain development. In *Wealth From Forests*, for example, RA is developing a value chain for local FSC-certified wood products — stewarding producers through the certification process, identifying high-end demand in urban markets, and linking producers to those markets. This value chain is complemented by other sustainable forestry initiatives, including silviculture, a carbon-offset program, and, more recently, promotion of non-timber forest products such as ginseng and other botanicals.

Modeling an alternative economic paradigm is the innovation across all of RA's programs. This means not only demonstrating economic viability but also showing that it requires building and maintaining the stock of other capitals. Community-building work in disadvantaged areas, on which RA's earlier successes were built, is an integral part of this innovation. So too is deep networking among "fringe" players in an alternative economy, the harnessing of passion and civic-mindedness by RA's leadership, and its engagement of a younger generation through volunteer programs. It is these nurtured connections that lubricate every link in the chain, creating the momentum for a viable rural economy.

## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- Systems thinking within RA (which included developing a theory of change) worked in tandem with community education and partnerships through networks, applied patiently over time
- Tapping into intellectual capital (RA's programs typically involve collaboration with knowledge institutions such as Ohio State University)
- RA is slowly shifting a culture adapted to an extraction economy to a vibrant entrepreneurial economy that build and retains local wealth.



### The key factors that contributed to the success of Rural Action:

- Patient engagement with communities with a focus on building and maintaining relationships of trust
- Deep understanding of how to apply value chains and generate multiple forms of wealth
- Heavy investment in building networks to support the growth of sustainable local economies
- Support from progressive local politicians (e.g., Tom Johnson, mayor of Somerset, Ohio).

### The challenges:

- The shale development boom that began in 2012 threatens to sway cash-starved people and places with yet another extraction boom-and-bust cycle
- Sustaining the organization (Rural Action) in a general climate of diminishing government and philanthropic support
- Balancing risk: In choosing to serve as neutral conveners offering safe space for multiple points of view, RA has to stay credible as a principled organization true to its long terms goals promoting a new type of economy.



## RESIDENT OWNERSHIP AND NEIGHBOURHOOD TRANSFORMATION: THE VILLAGE AT MARKET CREEK

**Case study writer:** Tom Dewar

**Presenters:** Roque Barros, Macedonia Arteaga, and Tom Dewar

**Facilitator:** Anuj Jain

### SUMMARY OF THE CASE STUDY

The Village at Market Creek is located in the diverse Diamond Neighborhoods of southeast San Diego, California. Its story involves a risk-taking philanthropic foundation, combined with local determination to achieve neighbourhood revitalization and resident ownership. After 10 years of “putting dribs and drabs of money and time here and there,” the Jacobs Family Foundation (JFF) decided on a more in-depth approach in one geographical area. JFF staff got together with the Diamond Neighborhood residents and organizations and identified an abandoned factory site. JFF bought the 20-acre site and moved its offices into the area. It committed to listen to and plan with area residents. An experienced community organizer was hired and along with other staff he went out into the community to find out what its members wanted on that site, taking care to visit with people from as many as 16 ethnic groups. Among the ideas that surfaced, a grocery store soon rose to the top of the list. Work then focused on how to proceed in a way that would allow the residents to have some “skin in the game,” as JFF founder, Joe Jacobs, liked to say. Out of this commitment came Market Creek Plaza, now a vibrant commercial and cultural centre with \$34.8 million in retail sales operating on 10 acres of former wasteland.



The design and implementation of this project relied on shared work of community groups. Some existed before work on the Village began, but most have emerged over the past ten years. A core goal of JFF was to make it possible for residents to become owners. This required an innovative ownership structure and an innovative tool for broad-based ownership — a Community Development Initial Public Offering, which was eventually approved by the State of California. A resident-led Ownership Design Team decided that owners had to be: residents of the Diamond neighbourhoods, people who own or work in the Diamond, or people who volunteer with an area group. The team decided that 20% of the total financing should be reserved for resident owners. They held workshops to explain the opportunity and found 425 community investors. The average investment was \$1,176. Dividends are distributed among resident owners first, neighbourhood foundations second, and other investors next.

Market Creek Plaza has achieved many of its goals. In retail sales, it has met or passed its target goal every year since 2008, allowing dividends to be paid every year since 2007. It now provides 92 full-time and 121 part-time jobs, 68% of which are held by area residents. These statistics speak to the project’s capacity to deliver on promises made to residents. The Village is still evolving, breaking new ground. The Plaza has become a cultural hub featuring a number of social enterprises, and in March 2012 the Village has earned a silver-level “Leadership in Energy and Environmental Design” certification from the U.S. Green Building Council for neighbourhood development, only the third such project in the U.S. to be so recognized. Its story provides an extraordinary example of innovative practice by a philanthropic foundation, and innovative principles of community organizing and financing for local ownership and control. It is a testament to how assets, equity, and community building strategies can combine in innovative ways to realize ambitious goals.

## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- The funder's conviction that residents should have "some skin in the game"
- This case demonstrates that a project initiated by an external funder can successfully come to be led and owned by the community
- JFF's pledge to "sunset" and turn over all its remaining assets to community in about 20 years has been instrumental in cultivating a sense of urgency and sustained focus on results among the residents involved in the initiative
- The Village at Market Creek demonstrates a model of business with a social focus that works well with the ownership shared among multiple ethnic groups.

### The key factors that contributed to the success of the Village at Market Creek:

- JFF's commitment to a long "listening phase" to determine the residents' priorities. (This phase is critical if change is initiated by external actors.)
- JFF took concrete actions to show the residents that it was there "for the long haul with the community" (such as moving its offices to the neighbourhood), which helped built their trust
- Innovative financial ownership strategy developed by JFF — gradually moving to full community ownership (through the Community Development Initial Public Offering, JFF has enabled residents to own 20%, and new neighbourhood foundation another 20% of the first phase of the Market Creek Plaza development, and has pledged to turn over all remaining assets to the community in 20 years.)
- JFF staff encouraged the establishment of resident teams to oversee various aspects of the initiative (e.g., business development; ownership structure; arts and culture), which helped achieve shared decision-making and accountability
- Unusual flexibility of the funder who had no problem with the changing contours of the initiative.

### The challenges:

- The initiative has overcome the initially low expectations of area residents, creating the challenge of having to deal with increased expectations in the days to come
- JFF is a limited-life foundation that plans to sunset around 2030, so the community needs to grow to be ready for the stewardship of the initiative by that time
- Generating enough revenue to be sustainable
- The Initial Public Offering had a 500-person cap, which may have excluded some residents from participating as shareholders. How can this initiative be kept open to new people?

## A PUSH STORY: CITIZEN-LED ACTION FOR SUSTAINABLE HOUSING IN A LOCAL GREEN ECONOMY (BUFFALO, NY)

**Case study writers:** Behrang Foroughi, Rachel Garbary

**Presenters:** Behrang Foroughi, Lonnie Barlow,

**Micaela Shapiro-Shellaby**

**Facilitator:** Adam Baden-Clay

### SUMMARY OF THE CASE STUDY

At the turn of the century Buffalo faced population shrinkage it had never experienced before. Massive job losses, vacant lots, and abandoned homes revealed the enormity of economic and social strain in a city that had once been a regional hotspot for industrial and economic growth. Under the leadership of two community organizers and with funding support from the Echoing Green Foundation, concerned citizens of Buffalo's West Side established a member-based organization called People United for Sustainable Housing (PUSH), with a view to forging a strong community that would enable people to obtain decent housing in the neighbourhood which then saw the greatest levels of poverty in the city.



The emergence of PUSH in 2005 provided opportunities for the residents to unite around burning issues. Through continuous dialogue and community mobilization, PUSH successfully lobbied authorities to gain control of some vacant land lots in the neighbourhood. PUSH was then able to secure funding for green building and weatherization of homes in Buffalo West, establish a community centre as a hub for community organizing, obtain funds for the creation of a community park, and work with training and contracting agencies to provide job opportunities for the residents. Every initiative in community and housing development undertaken by PUSH has taken environmental sustainability into consideration.

PUSH's core principles include active member involvement, relevance of development initiatives to the community at large, and economic and social justice. The economic benefits are gained through creating green job opportunities for the residents with a focus on locally owned ventures that will provide both jobs and skills development. The social outcomes are achieved through creating inclusive, safe, and accessible public spaces for the residents to connect, organize, collaborate, and pursue collective plans.

Whether it has been engaged in establishing a green development zone, or creating quality affordable housing and jobs, or pushing for energy justice, PUSH Buffalo has linked community members to innovative social and economic programs and public and private financial investment opportunities. In 2012, for example, it founded a community-based energy efficiency program called PUSH Green. Funded by PUSH Buffalo and New York State Energy and Research Development Authority, PUSH Green provides community members with better access to environment-friendly job opportunities in the area, and helps bring together contractors and home energy efficiency experts.

PUSH has been instrumental in aligning the interests of diverse stakeholders through the forums it has organized to promote Buffalo's Green and Healthy Homes Initiative. These open forums have enabled construction, weatherization, and hazard abatement contractors, job training entities, and workers in green jobs sectors to unite around a common vision of well-being for Buffalo's West Side. This initiative, like the

rest of PUSH's work, has shown that its magic lies not so much in the amount of green infrastructure it has helped create as in its remarkable capacity to drive community economic development beyond merely allowing people to earn an income and afford a home.

## **SUMMARY OF THE DISCUSSION**

### **The most exciting aspects of the case study:**

- The core of PUSH is made up of people who are intensely passionate about their work
- PUSH leaders show willingness to embrace surprise, to revel in things that did not go according to plan
- PUSH leaders won't shy away from confrontational tactics ("name-blame-shame for change")
- PUSH intentionally maintains a flat organizational structure to minimize bureaucracy and encourage everyone to make decisions and take responsibility for the outcomes
- PUSH activists identify prospective leaders by relying on a simple principle: "Leadership is shown by how often you show up"
- PUSH campaigns offer ample opportunities for on-the-job training of emerging community leaders.
- PUSH organizers — guided by Marshall Ganz's view that our stories help us find common values and interests that unify us across "issue silos" — rely substantially on harnessing the power of personal storytelling for building effective, cohesive activist teams
- PUSH leaders explicitly link their work to critical societal concerns (one of PUSH's slogans is: "Sustainability is not just a lifestyle; it's about survival!").

### **The key factors that contributed to the success of PUSH:**

- PUSH leaders have been able to engage productively with authorities and tap into government funding for green initiatives
- By making skills development programs part and parcel of its work PUSH has not only improved employment opportunities for the residents but also achieved credibility in their eyes
- PUSH leaders are committed to creating open and inclusive community spaces to foster a culture of civic engagement
- PUSH members rely on door-to-door, face-to-face coalition building to win broad support for a cause
- PUSH leaders do not fear experimenting and making mistakes.

### **The challenges:**

- Coordinating increasingly diverse strands of work
- Keeping the organization youthful
- Moving beyond the "project model"
- Scaling up green home construction work to increase "tangible impact."

## THE DEEP SOUTH WEALTH CREATION NETWORK

Case study writer: Phil Davison

Presenters: Barbara Shipman, Bonita Conwell,  
Cheryl Peterson, John Littles, and Phil Davison

Facilitator: Deb Markley

### SUMMARY OF THE CASE STUDY

The Deep South Wealth Creation Network works to develop agricultural value chains for the purpose of sustaining the natural resources and improving the livelihoods of rural African American families in Alabama and Mississippi. Since 2011, members of the Network have worked in partnership with the Ford Foundation's Wealth Creation and Rural Livelihoods Initiative. Initial research funded by the Ford Foundation identified and assessed the possible and existing components of the value chain, defined a set of investment and capacity needs for growing the value chain, and uncovered the opportunities and challenges related to value chain development. Motivated by the results of this research, the Network is constructing agricultural value chains in rural areas of Mississippi and Alabama.



Rural communities in Mississippi and Alabama have historically faced persistent challenges that have placed African Americans at the heart of massive change and innovation. It is in these two states that the Civil Rights struggle began, bringing about dramatic cultural and political changes that have transformed the United States over the past fifty years. Despite these changes and the inspiring fundamental shifts in the socio-economic and political system, Mississippi and Alabama still experience entrenched poverty, low education rates, and systemic racism. An undervaluing of education, limited local control of resources, outmigration of youth, and the dominant narrative characterized by what people do not have rather than what they do possess have led to weakened community capacities and the disenfranchisement of many rural communities. And yet, hope and opportunity are growing.

The Deep South Wealth Creation Network celebrates and continues the Civil Rights struggle by using the natural and human assets within the region to create a new economic future for African Americans in the South. Specifically, the Network builds on these assets to link farmers into value chains where they work together to meet the food demands from high-end restaurants, large-scale institutional buyers, and local schools while investing in a shared infrastructure and receiving the training required to succeed in a competitive market place. The Network aims to establish at least two value chains for members so that local products can be sold into wholesale and retail markets. The revenues earned are re-invested to support the continued development of value chains and to encourage the involvement of youth and other community members.

The Network has been successful in establishing trust and creating hope among its members by becoming a vehicle for regional cooperation and innovation. African American farmers see how the collective power of the organization deepens the impact and expands the scale of their individual efforts. By building upon the knowledge of local people and by helping them to recognize the potential of the assets they possess, the Network has changed the previous and disempowering narrative of “have not” to “have much.”

## SUMMARY OF THE DISCUSSION

### The most exciting aspects of the case study:

- Network founders are committed to building identity capital: “We had to move from the ‘crabs in a basket’ syndrome. If one crab moves out of the basket, all the others will still get cooked. We need to link claws so we all get free to create wealth in this region” (Cheryl Peterson)
- The farmers involved in the Network have come to view their work in terms of building long-term wealth rather than momentary income
- The Network has triggered a shift from “I” to “We” among participating farmers: “When we first came in, it was all selfishness. Everyone wanted their own processing facility, trucks. . . . Everyone was stuck. Sharing resources and knowledge has been an incredible shift in mindset over these 18 months. Instead of ten farmers buying insurance, one organization would now buy it for the group” (John Littles)
- Network members are investing in collective capital (e.g., farm equipment). “Cooperatives are developing. Sense of community has returned” (Cheryl Peterson)
- The Network provides a mechanism to transfer farm knowledge to young people
- The Network’s work is geared to demand; it has ambitious expansion plans — negotiations are already underway with several big-box retailers (such as Belle Foods and Wal-Mart).

### The key factors that contributed to the success of the Deep South Wealth Creation Network:

- Timing — interest in locally produced food and healthy eating is on the rise
- Participating institutions have developed value chain analysis tools and growing protocols
- Regulations for healthy school lunches have led to increased demand for the Network’s products
- Network members have relied first and foremost on social and cultural capital to strengthen and create value chain relationships
- The Network has created job opportunities on farms that need support with planting, harvesting, etc.
- The Network has helped forge a union between farming skills and modern technology (young people assist their farming parents with data processing).

### The challenges:

- Entrenched poverty, apathy, low education rates
- More investment is required for small farmers to meet increased demands for their product and to expand into more competitive markets
- A strategy is needed to encourage local youth to view farming as a viable career
- Farmers need to be encouraged to follow the growing protocols developed by the university and college partners in order to prevent reduced crop yields and inferior quality
- State and local policies that benefit large agricultural companies but may be discouraging for small farming operations (that are typically owned by African Americans) must be challenged and changed
- A uniform record keeping system is needed for producers and intermediary groups helping the farmers in order to manage workflow and respond to inquiries for information
- Limited financial resources limited the number of the farmers who could join the Network.



## AN EVENING PANEL DISCUSSION IN ST. ANDREWS

This session, which took place after case study discussions, served as a “stepping stone” to the next phase of the forum: exploration of the key themes and challenges emerging from the cases. It provided forum participants with three mutually enriching perspectives addressing the question: “What will it take to create a new kind of economic model in which livelihoods, social equity, and environmental sustainability are at the centre?” The panelists included Sheila Watt-Cloutier, a Canadian Inuit environmental and human rights activist; John McKnight, a founder and co-director of the Asset-Based Community Development Institute at Northwestern University; and Wayne Fawbush, a Program Officer with the Economic Opportunity and Assets Unit of the Ford Foundation.



Sheila Watt-Cloutier personalized the struggle of all Inuit people whose livelihood and culture are threatened by climate change. Known for their adaptability, the Inuit nevertheless have “a right to be cold,” the title of her recent book. She stressed the importance of giving economic issues a human face, showing how the industrial model has impacted Arctic peoples far away from the source of carbon emissions. She has led an appeal to a universal principle of right to livelihood, violated by governments that are shirking responsibilities for the impacts of climate change.

John McKnight highlighted seven domains, or functions, that local citizens — rather than governmental institutions — are going to be primarily responsible for, which will be the base of the future of economy: health; security and safety; education (especially the upbringing of young children); environmental protection (through improved energy efficiency and waste management); economy (hatching local business initiatives); food sovereignty; and care in an all-encompassing sense — for each other, for our children, for our elders, for those who have been labeled and marginalized. He also indicated the three key resources that we as citizens should tap into in order to fulfill the functions that government institutions can no longer perform: (1) the gifts, capacities, skills, and abilities of each of us; (2) the groups that we form to do all kinds of community work; and (3) hospitality — which provides protection against isolation, insulation, and parochialism.

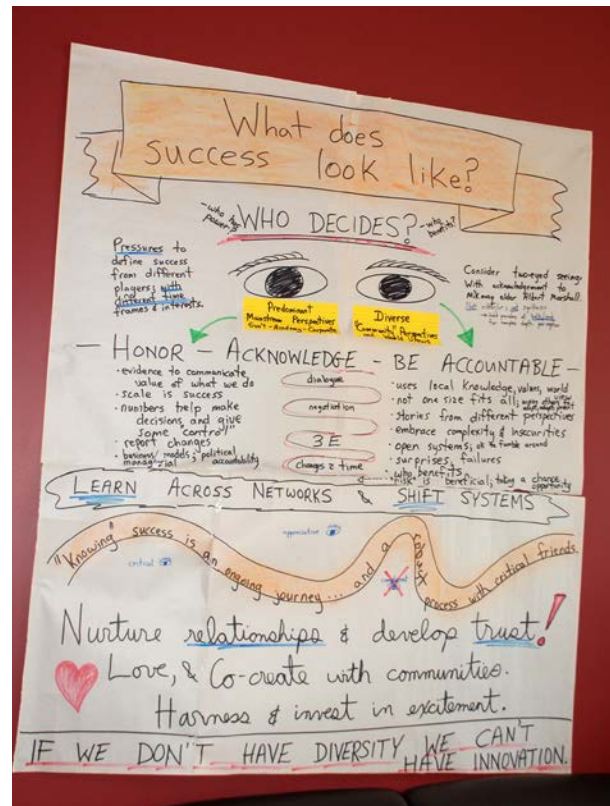
Wayne Fawbush identified the five principles that must be put into action in order to create economic systems integrating livelihoods, social equity, and environmental sustainability: (1) we need to break down the division between community development and economic development; (2) every economic system that we build has to incorporate resilience as one of its core characteristics; (3) whatever we do has to be scalable; (4) we need to develop and use a terminology that makes sense to all stakeholders; and (5) we need to be able to show that we actually have results from the work we do.

# Thematic Discussions

## DEEPENING OUR ANALYSIS: EMERGING THEMES AND DISCUSSIONS

The second day of the forum began with a synthesis and feedback from the previous day, which this plenary session was dedicated to. During the previous afternoon, participants filled in cards outlining their impressions of the key success factors as well as the remaining challenges in the cases presented, and what had excited them most about these cases. Based on this feedback, the synthesis team developed eight themes for further discussion. These included:

- What kinds of wealth need to be created for sustainable development?
- What kind of leadership sparks organizing, innovation, and social change?
- What strategies for organizing and coalition building are effective?
- How can citizen-led innovation be taken to scale?
- How can we use culture as an asset for change?
- How do citizen-led activities secure sustainable financing?
- How do we create policy spaces and opportunities for citizen-led social innovations?
- What does success look like?



## THEME 1: WHAT KINDS OF WEALTH NEED TO BE CREATED FOR SUSTAINABLE DEVELOPMENT?

**Facilitator: Barbara Wyckoff**

Based on a comprehensive view of wealth as the stock of all assets that can contribute to people's well-being, this thematic discussion examined innovative approaches to development that seek to create or build on the multiple kinds of community wealth (e.g., individual, social, or political capital), take advantage of synergies among different forms of wealth, respond to local priorities, and involve strategies aimed to facilitate upward mobility of people at the grassroots.

### Learnings from the case studies and experience:

- Human capital — experiences, skills, and ideas people are bringing to a project — needs to be recognized as an investment
- At the same time, funders should be encouraged to invest in human capital
- The term “wealth” needs to be redefined and “repatriated.” Wealth is what we value. If it is understood this way, then everybody can see their part in wealth creation, even people who currently do not feel that they are part of the economy.
- Wealth equals assets
- Connection between wealth and agency. In the presentation on the Deep South Wealth Creation Network, Phil Davison talked about “identity wealth” which could be considered another form in the wealth matrix. It is a sense of agency, being able to do with whatever wealth you have.
- It is helpful to distinguish political capital from social capital. In the Deep South case, the farmers involved in the initiative had social capital (ability to organize and form relationships), but no political capital (ability to influence others).
- Access to financial capital at a community level is also crucial for development, especially in rural and depleted areas. As the New Dawn case demonstrates, in such areas there is a desperate need for community pools of money overseen by risk-takers and people who understand the community to move things forward.
- The PUSH story and other cases reveal a sense of wealth related to being part of a movement — the sense that you are making a difference. This over time can evolve into more tangible forms of economic wealth.

### Participants made the following recommendations:

#### 1. For citizens and communities

- Sharing stories about what we value makes us recognize the multiple forms of wealth in our lives
- Asset mapping helps people understand and celebrate what they already have
- Try to create a different narrative — start conversations about self-determination, the human capital that exists in your community
- It is important to understand that there is more than one bottom line and that different forms of wealth don't work in isolation.

## 2. For civil society organizations / government / private sector practitioners

- Risk tolerant funding has to be made available for communities to be able to test their initiatives. It should involve no threat of a penalty if the initiative doesn't work
- More importance should be given to identifying and training leaders from the community who will create the "springs" of community-based wealth — excitement and movement for a better future.



## 3. For donors / investors

- Develop a comprehensive view of wealth that takes account of people's values
- Recognize human capital — the knowledge, skills, and passion that people contribute to a project — as a matching investment
- Take notice of existing community assets (such as leadership to implement an envisaged initiative) that show it's a good investment to take to scale
- Work with communities to develop risk management systems and measures of success that make sense to them.

## THEME 2: WHAT KIND OF LEADERSHIP SPARKS ORGANIZING, INNOVATION, AND SOCIAL CHANGE?

**Facilitator: Phil Davison**

This thematic discussion considered leadership as a complex, multifaceted phenomenon that includes the personal characteristics, capacities, and behaviours of leaders as well as the characteristics of institutions and external environments that foster the emergence of leaders capable of driving social change.



### **Learnings from the case studies and experience:**

- Innovative leaders must be creative and capable of fostering creativity in others
- Leaders who aspire to catalyze social change must be tenacious and principled
- Leaders must put people first and always encourage involvement
- Appreciation of diversity is essential for effective leadership
- Continuous learning is key to innovative leadership
- People who drive social change lead through personal connection (which may involve charisma but is certainly more than charisma)
- Leaders must be able to take a calculated risk
- Leadership needs to adapt to the context (it is important to know when to be in front, when to be behind, and when to be among)
- Leaders need to create safe, accessible, and inclusive spaces for public conversation
- Leaders need to be passionate and courageous storytellers
- Leading change requires humble audacity.

### **Participants made the following recommendations:**

#### **1. For citizens and communities**

- Take the approach “We can! We must!” There is too much at stake, too much to lose, and too many opportunities. To sit back and not take action is not an option.
- Demand openness and consultation opportunities from organizations and government.

#### **2. For civil society organizations / government / private sector practitioners**

- Focus on building ongoing opportunities for community input in development initiatives
- Ensure that your organization is value-driven
- Foster a learning culture that will enable your organization to continually expand its ability to shape its future

- Help create safe spaces for broad discussion of issues of common concern, but do not direct or control the conversation
- Be open to surprises.

### 3. For donors / investors

- Develop funding relationships that encourage people to explore ideas and take risks
- Acknowledge that projects may not always have the outcomes that are expected, and that this does not necessarily mean failure
- Invest in training to help build mission-critical competencies
- Distribute detailed information about funded initiatives.



## THEME 3: WHAT STRATEGIES FOR ORGANIZING AND COALITION BUILDING ARE EFFECTIVE?

**Facilitator: Deborah Markley**

Participants in this thematic discussion probed various strategies for building coalitions and partnerships with a view to identifying the elements that are worth relying on — over time and across initiatives.

### Learnings from the case studies and experience:

- There are certain fundamentals for effective organizing / coalition building:
  - trust
  - transparency
  - awareness of one's own interests, principles, capacities
  - holding ourselves accountable
- There are three important questions to ask when deciding if a partnership will help a group or community achieve their goals: (1) How many of the things we want to do can we achieve with our own assets? (2) How many of these things require a partnership in order to get done? (3) What trade-offs are involved in entering into a specific partnership?
- There is no substitute for face-to-face interaction (door-to-door organizing)
- It is essential to be responsive to what is coming up but also to have a design or intent as to how you could be doing it better
- A wealth creation framework introduced to a community should be loose enough so that community members can respond to it in a way that reflects their priorities and strengths
- The real synergy comes from working with groups that are very different from you. Those coalitions are the most difficult to build and maintain, but they are the most beneficial.
- Partnership involves a certain degree of giving up: this is not an easy aspect of it, but it has to be recognized and accepted
- Engaging funders is a double-edged sword: large-scale donors can dictate the development process, thereby disrupting genuine partnerships
- Civil society organizations should maintain the right balance between their commitments to people at the grassroots and their relationships with those in power
- The sharing of resources is one of the main reasons why people partner
- Developing a code of conduct for dealing with outside partners can help community organizations avoid mission drift and choose partnerships that will actually help them achieve their goals.



## Participants made the following recommendations:

### 1. For citizens and communities

- There is a value in defining what your interests are and who you intend to partner with
- Make sure that people know your story — then they'll be more likely to come to a meeting or rally you want them to take part in
- When entering into a partnership, set the tone — highlight what you can bring (your assets) rather than what you need
- If the work is directed towards a multi-faceted goal (e.g., triple bottom-line), one party cannot do it all — so understand the necessity of partnering
- Establish relationships/trust as the cornerstone of every initiative
- Do a power analysis to understand the power differential in coalitions / partnerships
- Rather than looking for “the right institutions” to partner with, focus on finding champions within institutions — the “can do” people who can move your message up through the appropriate channels.



### 2. For civil society organizations / government / private sector practitioners

- Build trust by supporting citizen efforts — be the legs of the table
- Recognize that when it comes to place-based community building, the process is going to be different in each place
- Help community members or groups identify their own interests and then assist them in understanding what are the common interests they share with other people or groups within the community, and how they can work together to realize those shared interests
- Create spaces where people can have an honest conversation about their specific interests
- Help people at the grassroots confront a sense of powerlessness, the fear of losing identity
- Foster a sense of dignity among others at the table.

### 3. For donors / investors

- Transparency is critical: be clear about what your role is going to be — whether your primary concern is to support community-generated initiatives or to implement your own agenda
- Be flexible and open to new ways of doing things
- Recognize that it takes resources to sustain partnerships and provide seed money for coordinating coalition building as this will ultimately help save money in the long term
- Long-term dollars are needed
- Avoid layering on more and more reporting requirements.



## THEME 4: HOW CAN CITIZEN-LED INNOVATION BE TAKEN TO SCALE?

**Facilitator: Tom Dewar**

This thematic discussion focused on the ways to accelerate the diffusion and adoption of successful innovations so that large-scale, enduring change is achieved, while maintaining engagement with communities that pioneered these innovations.

### **Learnings from the case studies and experience:**

- The goals of a development initiative define, at least to some degree, the scale of success. Therefore, these goals of a particular initiative must be clearly defined in order to decide whether to take it to scale, and how this can be achieved.
- Being clear about what exactly is being taken to scale is fundamental
- Scaling up can mean a number of things — e.g., deepening the ongoing work in the same areas (communities), broadening its reach and gaining wider support, or sharing with others (replicating similar initiatives in other places)
- Successful scaling up to a new level requires finding partners respecting the community's aspirations and ways of doing things at that level, which may not be easy.

### **Participants made the following recommendations:**

#### **1. For citizens and communities**

- Bringing your initiatives to scale carries risks as well as potential benefits — so make sure that going to scale will strengthen the work you have chosen to do
- Think about added resources and responsibilities that it will take to take your initiative to scale before committing yourself to this task.

#### **2. For civil society organizations / government / private sector practitioners**

- Be willing to help build relevant networks and asset pools for going to scale, but always look at community benefit as your guide
- Be aware that scaling up an initiative may lead to its progressive “disengagement” from the community that has started it — and, therefore, the progressive loss of enthusiasm and sense of purpose provided by the community. When going to scale, make sure that enthusiasm and sense of purpose at the community level remain strong.
- Recognize that it takes time, practice, clear guidelines, and trustful interaction with other stakeholders along the way to be good partners in going to scale.

#### **3. For donors / investors**

- Do not impose your agenda and timelines, but be flexible and willing to adapt to what helps move work forward to a new level
- Think about the stage that the work-to-be-scaled is at, and provide support that is appropriate to that stage.

## THEME 5: HOW CAN WE USE CULTURE AS AN ASSET FOR CHANGE?

**Facilitator: Deborah Barndt**

This thematic discussion adopted the “talking circle” format with each participant speaking in turn about their experience of integrating culture into their work, particularly into projects or initiatives that involved community organizing and movement building. Only one participant spoke at a time and no one was expected to have any answers or offer any advice. Rather, the intention was to “let our ears do more working than our mouths” — that is, create a community of learners reflecting on the issues brought up through personal stories that every participant shared with the others.

This exercise in storytelling grounded in personal experiences allowed the group to raise important questions about:

- Our very diverse understandings of culture and the “problematicity” of the culture concept (As Sylvia Maracle pointed out, the Aboriginal languages of North America have no word for culture: “Culture comes into play when other people are looking at you. They look at you and say, ‘That’s your culture.’ Very external concept. How one lives one’s life is internal.”)
- Deepening our understanding of culture to include “everyday good living” at its core
- Challenging the fragmentation in our thinking, which separates culture from economics or politics
- Challenging the power dynamics based on cultural differences
- Nurturing intercultural dialogue that recognizes cultural collisions but also taps into the richness of different cultural expressions
- Addressing the challenge of “no culture.” As John McKnight observed, “Culture implies collective life through time. Now we live in a time of high mobility. Community dilemma is that there is no culture [in the above sense]. What could you do about that? Is there a way of precipitating an organization or a set of relationships that grow up a culture, not programs?”
- Capitalizing on cultural heritage to stimulate the revitalization of areas suffering environmental, economic, or social distress
- “Unpacking” cultures to identify the characteristics that have enabled people, not merely to survive, but to thrive in harmony with their environment
- Acknowledging the oppressions involved in cultural clashes of the past and present as a prerequisite for learning together and going to the next step of co-creating a community of diverse cultures
- Finding the vehicles through which the coming together of different cultures makes something new and beautiful, the vehicles that work across language barriers, economic differences, and other divisions, and have the power to draw forth voices that are holding back (One example from the case studies is “Le Festival de Nations” in Saint-Michel intended to celebrate diversity and welcome newcomers to the neighbourhood where “difference is becoming a common denominator.”)
- Bringing the cultural and spiritual dimensions into play in the triple bottom line approach to development
- Breaking down stereotypes and learning how to be respectful in different cultures.

# Thematic Discussions

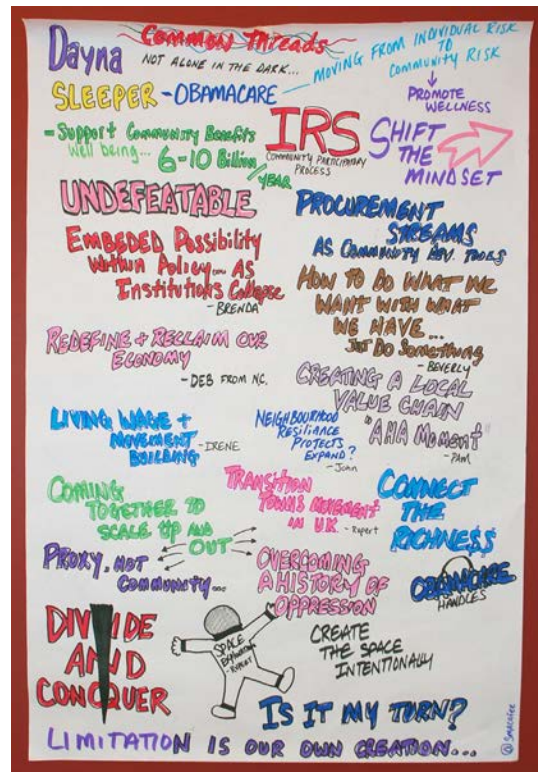
## THEME 6: HOW DO CITIZEN-LED ACTIVITIES SECURE SUSTAINABLE FINANCING?

Facilitator: Anuj Jain

This thematic discussion focused on the various instruments for the provision of financial capital in ways that enable the implementation of community development initiatives over the long term.

### Learnings from the case studies and experience:

- Patient capital is essential for the long-term financial robustness of community action
- It is important to create financial vehicles which will (a) enable ordinary citizens to be investors in community-based enterprises and (b) provide them with equal power in the governance of these enterprises regardless of the amount of their investment. (One such example comes from the Village at Market Creek, where the residents have established the Neighborhood Unity Foundation to support local nonprofits and individuals whose projects help build safe and healthy communities. The Foundation rules allow individual investments from \$200 to \$10,000, but all investors get one vote each.)
- It is important to hold regular community meetings to report on what initiatives were funded and what weren't and why — to keep transparency and a sense of community ownership of development
- Community building process is more than a set of economic tools; it is about the community coming together to own and manage assets collectively
- It is important to establish financing schemes that are not grant-dependent but focused on attracting investment in local enterprises (such as Nova Scotia's Community Economic Development Investment Funds)
- One of the prerequisites for sustainable financing of citizen-led initiatives is switching the conversation to the "we invest in us" mode
- Bringing external capital into community initiatives carries the risk of mission drift — and with it, the risk of losing local support.



## Participants made the following recommendations:

### 1. For citizens and communities

- Recognize that financing is a fuel, not an engine. Focus on building the engines of development — relationships of trust and appropriate institutions.

### 2. For civil society organizations / government / private sector practitioners

- Businesses have a vested interest in giving back, which they often fulfill in a haphazard way. Instead of giving out money ad hoc, why not to pool it and then give it out with strategy?
- It would be wise for local / regional governments to establish small grants programs to incubate new ideas generated by community groups
- Government should recognize that community building leads to innovations and invest into this process
- Civil society organizations and government should work towards democratizing capital by putting in place and supporting creative financing mechanisms (such as Community Economic Development Funds) coupled with decision-making processes that will be community-led.



### 3. For donors / investors

- Recognize that patient capital attracts passion capital
- Recognize the importance for the community to have control of some risk capital.

## THEME 7: HOW DO WE CREATE POLICY SPACES AND OPPORTUNITIES FOR CITIZEN-LED SOCIAL INNOVATIONS?

**Facilitator: Olga Gladkikh**

This thematic discussion addressed the challenge of taking grassroots conversations to the policy level and tackled the question of how citizens can use existing policy spaces and create or claim new spaces for social innovation.

### Learnings from the case studies and experience:

- Policymakers and citizens belong to two different worlds/cultures; they don't speak the same language and tend to distrust each other's motives and abilities
- Mutual learning is key to creating opportunities for social innovation: the bureaucracy needs to learn about people, and vice versa
- When government creates a space for the public to get involved in policy discussions, it takes it upon itself to invite people into that space, which sometimes raises concerns about who got invited and who didn't
- Top-down development planning is being challenged; new mechanisms for citizen participation are being created and sometimes used effectively
- It is hard to get policymakers to look at the evidence of success (in developmental initiatives) offered by people at the grassroots; therefore, one has to find creative ways to engage them
- "Gappers" straddling the worlds of policymakers and civil society play an important role in helping these each party understand the other
- Policy decisions are not always based on sound research. It would be wise to have communities involved not only in discussing policies, but also in doing research that would help shape policies.



### Participants made the following recommendations:

#### 1. For citizens and communities

- Build broad-based coalitions ("power with") and present a unified voice to policymakers
- Recognize that more forward thinking is needed to influence policy
- Take pains to get government into the community game (rather than waiting to be invited into the government game)
- Keep sharing experiences and tools you are using now; no need to reinvent the wheel
- Use underutilized spaces at the local/municipal level to leverage policy changes at the provincial/federal level.

## 2. For civil society organizations / government / private sector practitioners

- Provide ongoing leadership and advocacy training to citizens that will enable them to understand how the policymaking process works and obtain the skills to influence it
- Create spaces for citizens to come together to create a vision for their community and toolkits to help them assess the likely impacts of proposed policies and programs on their life (the instruments that have been used successfully for these purposes include the “People Assessing Their Health” process and “Community Health Impact Assessment Tool” promoted at Coady International Institute)
- Civil society organizations need to be more creative in communicating proposed policies and their potential impacts to citizens and use different channels of communication to reach different audiences (including social media or popular theatre)
- Government agencies should have certain lenses through which they examine all new policies (e.g., “Health in All Policies” lens or “Diversity and Cultural Inclusion” lens)
- Governments should institutionalize mechanisms of citizen participation and ensure they are authentic and meaningful
- Governments should be clear about the role the public can play in shaping policy decisions
- Governments should be radically transparent (providing information that is easy to understand, complete, and readily accessible)
- Government officials should be clear about the values that underpin their approach to development.



## 3. For donors / investors

- When a grassroots initiative is working, focus on helping it evolve in a way that is meaningful to people in the community.

## THEME 8: WHAT DOES SUCCESS LOOK LIKE?

**Facilitator: David Fletcher**

Participants in this thematic discussion examined the various ways of understanding success in development work, focusing in particular on the tension between what people at the grassroots count as success in their community and how success is typically defined by government, funders, and academia, and on the role of intermediaries in helping communities achieve their development initiatives.



### **Learnings from the case studies and experience:**

- The question of who decides what counts as success is just as important as the question of what success looks like. When discussing the success of development initiatives, it is important to bear in mind who has the power and who benefits from different visions of success. There needs to be a shift in perspective so that the communities involved — especially those currently or historically marginalized — have the opportunity to articulate their own visions of success.
- There are pressures to define success coming from a multitude of actors — government, funders, the academia, media, and others. These different actors may have different interests as well as different criteria and time frames for measuring the success of development initiatives.
- There is a need to encourage dialogue between different ways of knowing and different visions of success. Borrowing a phrase from Mi'kmaq elder Albert Marshall, we need to cultivate “two-eyed seeing” so as to acknowledge, honour, and be accountable to both the mainstream perspective on success and the diverse, complex, and changing community visions of what success looks like. Community visions rely on local experiential knowledge, values, and ways of seeing the world; they embrace complexities and uncertainties, accommodate surprises and even failures, and are open to taking chances.
- There is a difference between measurable success and demonstrable success. (For example, one cannot measure the feeling of security, but it can be easily demonstrated through stories.)
- Scaling up developmental initiatives for “more success” involves the risk of losing the energy and inspiration that originally came from the community
- We need to recognize that success is an ongoing journey, a robust process of mutual learning with critical partners and friends
- In evaluations of success there should be a place for a “surprise factor” — what people didn't know at the outset but learned along the way about what they should have wanted. There is a learning dimension and you cannot say what you are going to learn ahead of time. This is a surprise factor.

### **Participants made the following recommendations:**

#### **1. For citizens and communities**

- Always ask ourselves who has the power to decide what success looks like, and who benefits from different visions of success
- Recognize that community-wide success should involve people across the spectrum — economic, social, racial, etc.
- Make sure that you participate in developmental initiatives in an informed way.

## 2. For civil society organizations / government / private sector practitioners

- Respect different world views and perspectives on success, and do not try to contort different points of view into one perspective designed to “fit all”
- Provide a space for a vision of success that comes from the community to be articulated
- Nurture relationships and develop trust, recognizing that achieving success is an ongoing process
- Find ways to harness the energy of various stakeholders by taking account of, and honouring, their differing visions of success.

## 3. For donors / investors

- Appreciate and honour the diverse ways of understanding success. Without diversity, there cannot be innovation
- Embrace a developmental approach to evaluation that focuses on generating insights and reflections
- Appreciate the learning by people at the grassroots. Ask the communities you are involved with: What can you do now that you couldn't do before?
- Acknowledge a vision of success that comes from the community
- When appropriate, ask development practitioners what they are doing (or what can be done) to “quantify” qualitative data to demonstrate change.





## SO WHAT? REFLECTIONS ON CITIZEN-LED SUSTAINABLE CHANGE: A PARTICIPATORY SYNTHESIS

During this session, participants, divided into small groups, shared the key learnings and insights from the thematic discussions. The following are some of the highlights of these group discussions:

- The close alignment between triple bottom line sustainability and value chain models that involve creating multiple forms of wealth
- The need to recognize culture as an overriding frame in wealth creation (rather than merely an asset)
- The many uses and benefits of storytelling (e.g., its effectiveness for community organizing; bridging the intergenerational gap; identifying the burning issues and celebrating successes)
- The value of a “two-eyed seeing” approach that brings the strengths of Indigenous and Western ways of knowing together for the benefit of all
- The role of arts as a “melting pot” where different cultures can collide in a constructive manner
- The necessity of developing appropriate frameworks for scaling-up development initiatives
- The critical importance of trust for coalition building, and of “tea and talk” (going door-to-door) for building trust
- The conviction that passion capital comes before financial capital



## NOW WHAT? PUTTING OUR LEARNING INTO ACTION

The major purpose of this closing plenary was to identify mechanisms by which the forum participants could support each other and continue to share their work across the United States and Canada. The ideas put forward included:

- Sharing the case studies presented at the forum as broadly and as quickly as possible
- Conducting webinars for a deeper exploration of the case studies
- Sharing new tools that prove to work in the participants' circumstances
- Organizing cluster groups on specific themes
- Convening regional gatherings dedicated to citizen-led innovations
- Ensuring greater accessibility to future conferences in the field of citizen-led innovations (especially for youth and other groups that are often underrepresented — through sliding scale fees and scholarships)
- Joining relevant networks (e.g., those organized by WealthWorks or the ABCD Institute) or creating an online "community of practice" involving all of the forum participants to begin with
- Establishing a web-based platform for sharing short stories of successful social innovations when they reach milestones

While working in small groups, participants were also asked to identify the key insight from the forum that would help build a broader movement for citizen-led sustainable change across North America, and summarize this insight in a tweet. The following are some of the tweets that convey the sense of a growing movement for social and economic justice:

- "Very cool and energizing meeting of minds on citizen-led economic/social change."
- "A tapestry of trial and error, sharing knowledge through relationships."
- "Great local experiments in economic democracy and using the market for social justice."
- "Do something from the heart then tell the story to a stranger then listen to their story."
- "Invite the stranger in, the abundance of people on the edge is potentially our greatest untapped asset."
- "Get off your assets! Knock on doors, share stories and food, claim power, shock the skeptics, redefine our world!"
- "Tapping into passion capital requires patient capital . . . financial capital follows (doesn't lead)."
- "Wealth is in the eye of the beholder."
- "Possibilities are only limited by our imagination and concept of self-efficacy."
- "Ordinary citizens making extraordinary change in their communities — leading the way."
- "Little people with little money can do big things."
- "Citizen-led change inspires us to grow a network to shift global economy and strengthen community."
- "We need to reclaim politics for the people. People power for true democracy through citizen-led sustainable change."
- "Let 1,000 flowers bloom, let 1,000 citizens lead sustainable change."

# Appendix 1: forum program

<b>Sunday   June 23, 2013</b>	
<b>1:00 PM - 5:00 PM</b> <b>Governors Hall</b>	<b>Registration and check-in</b>
<b>5:00 PM - 6:00 PM</b> <b>Morrison Hall</b>	<b>Welcome reception and cash bar</b>
<b>6:00 PM - 7:00 PM</b> <b>Morrison Hall</b>	<b>Official welcome and opening dinner</b> Dr. John Gaventa, Director of Coady International Institute and Vice President, International Development, StFX University Kerry Prosper, Paqtnkek First Nation Dr. Sean Riley, President, StFX University Marilyn More, Nova Scotia Minister of the Public Service Commission, Minister of Communications, and Minister responsible for Advisory Council on the Status of Women
<b>7:00 PM - 8:00 PM</b> <b>Morrison Hall</b>	<b>A kitchen table conversation: Why here? Why now?</b> Dr. Phil Davison, Director, StFX Extension Department Peggy Mahon, Director of Public Relations and Community Engagement, Guysborough Antigonish Strait Health Authority Dr. Teresa MacNeil, Chair of Rural Communities Foundation of Nova Scotia and Immediate Past Chair of Bras d'Or Lake Biosphere Reserve Association Dr. Roger Wehrell, F.C. Manning School of Business, Acadia University

<b>Monday   June 24, 2013</b>	
<b>7:30 AM - 8:30 AM</b> <b>Morrison Hall</b>	<b>Breakfast</b>
<b>8:30 AM - 9:00 A</b> <b>Schwartz Auditorium</b>	<b>Why now? Setting the stage</b>
<b>9:00 AM - 10:15 AM</b> <b>Schwartz Auditorium</b>	<b>The changing context of citizen-led sustainable change in North America - Panel discussion</b> <ul style="list-style-type: none"> <li>• Dr. Alison Mathie, Coady International Institute (Chair)</li> <li>• Dayna Cunningham, Executive Director of the Community Innovations Lab, MIT School of Architecture and Planning</li> <li>• Rupert Downing, Executive Director of the Community Social Planning Council of Greater Victoria</li> <li>• Sylvia Maracle, Executive Director, Ontario Federation of Indian Friendship Centres</li> </ul>
<b>10:15 AM - 10:30 A</b> <b>Schwartz Auditorium</b>	<b>Innovations in citizen-led sustainable change - Introduction to case studies</b>

10:30 AM - 11:00 AM Coady Community Foyer	<b>Break</b>
<b>CASE STUDY PRESENTATIONS</b>	
11:00 AM - 12:00 PM Coady 342	Humility and audacity: The story of Vivre Saint-Michel en Santé, Montreal, Québec
11:00 AM - 12:00 PM Coady 242	Everyday good living: The Ontario Federation of Indian Friendship Centres
11:00 AM - 12:00 PM Coady 265	A vision of flipping the iceberg of power: The Greater Edmonton Alliance faces big land and big oil, Alberta
11:00 AM - 12:00 PM Coady 150	Ecotrust Canada: Building the conservation economy, British Columbia
12:00 PM - 1:00 PM Morrison Hall	<b>Lunch</b>
<b>CASE STUDY PRESENTATIONS</b>	
1:15 PM - 2:15 PM Coady 342	"The people can do for themselves": New Dawn Enterprises, Cape Breton, Nova Scotia
1:15 PM - 2:15 PM Coady 242	A quiet movement: Inuit self-determination, Arctic region
1:15 PM - 2:15 PM Coady 265	Citizen-led sustainable change: The case of Sandhills Family Heritage Association, North Carolina
1:15 PM - 2:15 PM Coady 150	From the fringe to the mainstream: Rural Action's pursuit of a sustainable economy in Central Appalachia
2:15 PM - 2:30 PM	<b>Break</b>
<b>CASE STUDY PRESENTATIONS</b>	
2:30 PM - 3:30 PM Coady 242	Resident ownership and neighbourhood transformation: The Village at Market Creek, San Diego, California
2:30 PM - 3:30 PM Coady 265	A PUSH story: Citizen-led action for sustainable housing in a local green economy, Buffalo, New York
2:30 PM - 3:30 PM Coady 150	The Deep South Wealth Creation Network, Mississippi and Alabama
3:30 PM - 4:00 PM McKenna Leadership Centre Foyer	<b>Nutrition break</b>

# Appendix 1: forum program

3:30 PM - 4:00 PM McKenna Leadership Centre	Reflections and synthesis: What excites us? What are the challenges?
<b>Optional field trip: An evening in St. Andrews, Antigonish County</b>	
5:30 PM and 5:45 PM Governors Hall	Buses depart for St. Andrews
6:00 PM - 6:30 PM St. Andrews and District Community Centre	<b>Welcome and dinner in St. Andrews</b> <ul style="list-style-type: none"> <li>Linda MacDonald, Chair, St. Andrews Community Partnership</li> </ul>
6:30 PM - 7:30 PM	<b>Community tours:</b> <ul style="list-style-type: none"> <li>St. Andrews Senior Housing Authority</li> <li>Highlander Curling Club</li> </ul>
7:30 PM - 8:45 PM St. Andrews and District Community Centre	<b>Citizen-led sustainable change: Making a difference - Panel discussion</b> <ul style="list-style-type: none"> <li>Gord Cunningham, Coady International Institute (Chair)</li> <li>Sheila Watt-Cloutier, Past Chair of Inuit Circumpolar Council</li> <li>John McKnight, Co-Director, Asset-Based Development Community Development Institute; Professor Emeritus of Communications Studies and Education and Social Policy, Northwestern University</li> <li>Wayne Fawbush, Program Officer, Economic Opportunity and Assets Unit, Ford Foundation</li> </ul>
8:45 PM - 9:00 PM	Buses return to StFX

<b>Tuesday   June 25, 2013</b>	
7:30 AM - 8:30 AM Morrison Hall	Breakfast
8:30 AM - 9:30 AM McKenna Leadership Centre	<b>Deepening our analysis: Emerging themes and challenges</b> (Feedback from synthesis team and plenary discussion)
<b>THEMATIC DISCUSSIONS</b>	
9:30 AM - 10:30 AM Schwartz 152	<b>Theme 1: What kinds of wealth need to be created for sustainable development?</b>
9:30 AM - 10:30 AM Schwartz 156	<b>Theme 2: What kind of leadership sparks organizing, innovation, and social change?</b>
9:30 AM - 10:30 AM Schwartz 205	<b>Theme 3: What strategies for organizing and coalition building are effective?</b>

9:30 AM - 10:30 AM Schwartz 215	Theme 4: How can citizen-led innovation be taken to scale?
9:30 AM - 10:30 AM Schwartz 289	Theme 5: How can we use culture as an asset for change?
9:30 AM - 10:30 AM Schwartz 290	Theme 6: How do citizen-led activities secure sustainable financing?
9:30 AM - 10:30 AM Schwartz 190	Theme 7: How do we create policy spaces and opportunities for citizen-led social innovations?
9:30 AM - 10:30 AM McKenna Leadership Centre	Theme 8: What does success look like?
10:30 AM - 11:00 AM Schwartz Gallery	Break
11:00 AM - 12:00 PM	THEMATIC DISCUSSIONS (CONTINUED)
12:00 PM - 1:00 PM Coady Garden	Barbeque lunch
<b>INNOVATIONS MARKETPLACE</b>	
1:00 PM - 2:00 PM Schwartz Gallery	<b>“Open market” presentations:</b> <ul style="list-style-type: none"> <li>• Mapping assets using social media</li> <li>• Parent café guided conversation</li> <li>• Overcoming poverty together</li> <li>• Toolkits and resources to effectively engage ethnocultural communities</li> <li>• Measuring impact using the WealthWorks approach</li> <li>• Traceability: Consumer-facing product tracing</li> <li>• Decision support tools from Ecotrust Canada</li> <li>• Rural Action: Community ventures in sustainable development</li> <li>• Change labs and design labs</li> </ul>
1:00 PM - 2:00 PM Schwartz 205	<b>Workshops:</b> <ul style="list-style-type: none"> <li>• Building wealth using WealthWorks value chains</li> <li>• Wealth creation value chains</li> </ul>
1:00 PM - 2:00 PM Schwartz 215	<b>Workshops:</b> <ul style="list-style-type: none"> <li>• Consumer-facing product tracing</li> <li>• Decision support tools from Ecotrust Canada</li> </ul>

# Appendix 1: forum program

1:00 PM - 2:00 PM <b>Schwartz 285</b>	<b>Workshop:</b> • Naming the Moment - A tool for strategic action planning
1:00 PM - 2:00 PM <b>Schwartz 289</b>	<b>Workshop:</b> • Igniting engagement - Why stories matter in citizen-led development
1:00 PM - 2:00 PM <b>Schwartz 290</b>	<b>Workshops:</b> • Market Creek: Building community, capacity, assets, and ownership • Overview of the Green Business, Green Jobs Accelerator
2:00 PM - 2:30 PM <b>Schwartz Gallery</b>	<b>Dessert</b>
2:30 PM - 4:00 PM <b>McKenna Leadership Centre</b>	<b>So what? Reflections on citizen-led sustainable change: A participatory synthesis</b>
4:00 PM - 5:00 PM <b>McKenna Leadership Centre</b>	<b>Now what? Putting our learning into action</b>
<b>Farewell dinner and East Coast barn dance</b>	
6:00 PM <b>Governors Hall</b>	<b>Buses depart StFX for Crystal Cliffs</b>
6:30 PM - 7:30 PM <b>Crystal Cliffs</b>	<b>Cash bar</b>
7:30 PM - 8:30 PM <b>Crystal Cliffs</b>	<b>Farewell dinner</b>
8:30 PM - 11:30 PM <b>Crystal Cliffs</b>	<b>East Coast barn dance featuring Working Class Band</b>
9:00 PM, 11:00 PM, and 11:30 PM	<b>Return transportation to StFX</b>



# Appendix 2: Forum Participants

Interest and enrolment in the forum well exceeded its overall capacity of 150 participants, with a waiting list in excess of 25 people. The actual number of participants was 144 following a few last minute cancellations. Approximately 150 people attended the presentation in St. Andrews, including forum participants and the general public.

In terms of geographic representation, the breakdown of participants was as follows:

- 73 from Atlantic Canada;
- 38 from the rest of Canada;
- 33 from the United States.

The full list of participants is presented below.

**Roberto Abeabe** | United Way Toronto | Canada

**Omer Aijazi** | University of British Columbia | Canada

**Carrie Alison** | Waterloo University | Canada

**Tanya Andrews** | New Dawn Enterprises | Canada

**Marichu Antonio** | Ethno-Cultural Council of Calgary | Canada

**Shanon Archibald** | Coady International Institute, St. Francis Xavier University | Canada

**Macedonio Arteaga** | Jacobs Center for Neighborhood Innovation | USA

**Yvonne Atwell** | Nova Scotia Advisory Council on Public Engagement | Canada

**Adam Baden-Clay** | Coady International Institute, St. Francis Xavier University | Canada

**Pamela Bailey** | Community of Heatherton | Canada

**Lonnie Barlow** | PUSH Buffalo | USA

**Dorothy Barnard** | Strait Richmond Community Health Board | Canada

**Deborah Barndt** | York University | Canada

**Roque Barros** | Jacobs Center for Neighborhood Innovation | USA

**Deborah Bell** | HIPPY Canada | Canada

**Tammy Bernasky** | Coady International Institute, St. Francis Xavier University | Canada

**Patricia Bishop** | TapRoot Farms | Canada

**Cynthia Brown** | Conservation Fund | USA

**Joanna Brown** | Westmorland Albert Community Inclusion Network Co-operative | Canada

**Arthur Bull** | Bay of Fundy Marine Resource Centre | Canada

**Joel Burton** | Western University | Canada

**Cesar Cala** | United Way of Calgary and Area | Canada

**Colleen Cameron** | Coady International Institute, St. Francis Xavier University | Canada

**Coralie Cameron** | Lake Ainslie Development Association | Canada

**Nicole Cammaert** | New Dawn Enterprises | Canada

**Paula Carr** | Collingwood Neighbourhood House | Canada

**John Cawley** | The J.W. McConnell Family Foundation | Canada

**Eve-Isabelle Chevrier** | Vivre Saint-Michel en Santé | Canada

**Marie Cirillo** | Clearfork Community Institute | USA

**Maureen Coady** | Department of Adult Education, St. Francis Xavier University | Canada



# Appendix 2: Forum Participants

**Bonita Conwell** | Deep South Wealth Creation Network | USA  
**Laurie Cook** | Chutzpah Consulting | Canada  
**Dayna Cunningham** | Massachusetts Institute of Technology | USA  
**Gord Cunningham** | Coady International Institute, St. Francis Xavier University | Canada  
**Pam Curry** | Center for Economic Options | USA  
**Phil Davison** | Extension Department, St. Francis Xavier University | Canada  
**Karri Dawson** | Canadian Centre for Ethics in Sport | Canada  
**Michelle Decker** | Rural Action | USA  
**Molly Den Heyer** | Coady International Institute, St. Francis Xavier University | Canada  
**Tom Dewar** | Aspen Institute | USA  
**Robert Donnan** | Innovation Orchestra | USA  
**Noah Dorius** | U.S. Department of Housing and Urban Development | USA  
**Mary Beth Doucette** | Membertou First Nation | Canada  
**Rupert Downing** | Community Social Planning Council of Greater Victoria | Canada  
**Wayne Fawbush** | Ford Foundation | USA  
**Kristin Feierabend** | Aspen Institute | USA  
**Devlin Fernandes** | Ecotrust Canada | Canada  
**David Fletcher** | Coady International Institute, St. Francis Xavier University | Canada  
**Behrang Foroughi** | Coady International Institute, St. Francis Xavier University | Canada  
**Rebeka Frazer-Chiasson** | Northumberland Community Inclusion Network | Canada  
**Susanna Fuller** | Nova Scotia Advisory Council on Public Engagement | Canada  
**John Gaventa** | Coady International Institute, St. Francis Xavier University | Canada  
**Yogesh Ghore** | Coady International Institute, St. Francis Xavier University | Canada  
**Peter Gillespie** | Canadian Executive Services Organization | Canada  
**Doris Gillis** | Department of Human Nutrition, St. Francis Xavier University | Canada  
**Olga Gladkikh** | Coady International Institute, St. Francis Xavier University | Canada  
**Danny Graham** | Envision Nova Scotia | Canada  
**Maia Green** | Friends Uniting for Nature Society | Canada  
**Travis Green** | Aspen Institute | USA  
**Troy Greencorn** | Stan Rogers Folk Festival | Canada  
**Amanda Hachey** | Co-operative Enterprise Council of New Brunswick | Canada  
**Meghan Hallett** | Nova Scotia Department of Communities, Culture and Heritage | Canada  
**Dorothy Halliday** | Community Cares Youth Outreach | Canada  
**Michael Hope-Simpson** | Envision Nova Scotia | Canada  
**Sheila Isaac** | Coady International Institute, St. Francis Xavier University | Canada  
**Anuj Jain** | Coady International Institute, St. Francis Xavier University | Canada  
**Ammie Jenkins** | Sandhills Family Heritage Association | USA  
**Tom Johnson** | Village of Somerset | USA  
**Valerie Johnson** | Millbrook First Nation | Canada  
**Linda Jones** | Independent | Canada  
**Beverly Julian** | Millbrook First Nation | Canada

**Tyler Knowlton** | Nova Scotia Public Engagement Support Unit | Canada  
**Jill Koch** | Community Assets for Education Institute | Canada  
**Jacqueline Koerner** | Ecotrust Canada; University of British Columbia | Canada  
**John (Jody) Kretzmann** | Asset-Based Community Development Institute; Northwestern University | USA  
**Pattie Lacroix** | Canadian Community for Dialogue and Deliberation | Canada  
**Elizabeth Lange** | Department of Adult Education, St. Francis Xavier University | Canada  
**Lynn Ann Lauriault** | Red River College | Canada  
**Nanci Lee** | Coady International Institute, St. Francis Xavier University | Canada  
**Jennifer Leuschner** | Guysborough Antigonish Strait Health Authority | Canada  
**Eric Leviten-Reid** | Vibrant Communities Initiative | Canada  
**Melissa Levy** | Yellow Wood Associates | USA  
**John Littles** | McIntosh Sustainable Environment and Economic Development Initiative | USA  
**Brad Long** | Gerald Schwartz School of Business, St. Francis Xavier University | Canada  
**Scott MacAfee** | Economic and Social Inclusion Corporation | Canada  
**Fr. Douglas MacDonald** | Margaree Family of Catholic Churches | Canada  
**Dwayne MacEachern** | Judique and Area Development Association | Canada  
**Laura MacEachern** | Judique and Area Development Association | Canada  
**Pauline MacIntosh** | Extension Department, St. Francis Xavier University | Canada  
**Mark MacIsaac** | Extension Department, St. Francis Xavier University | Canada  
**Lynn Ryan MacKenzie** | Government of Nunavut | Canada  
**Eileen MacNeil** | Community Cares Youth Outreach | Canada  
**Patricia MacNeil** | Nova Scotia Department of Natural Resources | Canada  
**Teresa MacNeil** | Rural Communities Foundation of Nova Scotia | Canada  
**Joanne Macrae** | Envision Nova Scotia | Canada  
**Rankin MacSween** | New Dawn Enterprises | Canada  
**Shanthu Mano** | Greater Edmonton Alliance | Canada  
**Sylvia Maracle** | Ontario Federation of Indian Friendship Centres | Canada  
**Deborah Markley** | Center for Rural Entrepreneurship | USA  
**David Martin** | Comart Foundation | Canada  
**Christa Mascher** | Community Assets for Education Institute | Canada  
**Alison Mathie** | Coady International Institute, St. Francis Xavier University | Canada  
**John McKnight** | Asset-Based Community Development Institute | USA  
**Kelly Meagher** | Nova Scotia Advisory Council on Public Engagement | Canada  
**Juliet Merrifield** | Department of Adult Education, St. Francis Xavier University | Canada  
**Elizabeth Metcalfe** | Greater Edmonton Alliance | Canada  
**Claire O’Gorman** | YouthCO HIV and Hep C Society of BC | Canada  
**Sikander Panag** | Wilfrid Laurier University | Canada  
**Jean Panet-Raymond** | Vivre Saint-Michel en Santé | Canada  
**Christina Parsons** | True Sport Foundation | Canada  
**Brianne Peters** | Coady International Institute, St. Francis Xavier University | Canada  
**Cheryl Peterson** | McIntosh Sustainable Environment and Economic Development Initiative | USA

# Appendix 2: Forum Participants

**Ines Polonius** | alt.Consulting | USA  
**Paul Pross** | Nova Scotia Advisory Council on Public Engagement | Canada  
**Shanna Ratner** | Yellow Wood Associates | USA  
**Thomas Redfern** | Rural Action | USA  
**Brenda Reid-Kuecks** | Ecotrust Canada | Canada  
**Vanessa Roth** | Sackville Community Garden | Canada  
**Shelagh Savage** | Coady International Institute, St. Francis Xavier University | Canada  
**Alex Savanyu** | Ryerson University; Rexdale Community Hub | Canada  
**Pamela Scott Crace** | Envision Nova Scotia | Canada  
**Paul Shakotko** | United Way of Halifax Region | Canada  
**Micaela Shapiro-Shellaby** | PUSH Buffalo | USA  
**Barbara Shipman** | Deep South Wealth Creation Network | USA  
**Belinda Smith** | United Way of Halifax Region | Canada  
**Pat Stafford** | Vibrant Communities | Canada  
**Anton Struchkov** | Coady International Institute, St. Francis Xavier University | Canada  
**Allister Surette** | Université Sainte-Anne; Nova Scotia Advisory Council on Public Engagement | Canada  
**Tracey Thomas** | African Nova Scotia Affairs | Canada  
**Satsuko VanAntwerp** | Social Innovation Generation | Canada  
**Mark van de Weil** | Nova Scotia Department of Economic and Rural Development and Tourism | Canada  
**Mary van den Heuvel** | St. Andrews Community Partnership | Canada  
**Ulrich vom Hagen** | Nova Scotia Department of Natural Resources | Canada  
**Jarot Wahyudi** | Cowater International | Canada  
**Tanya Wasacase** | Coady International Institute, St. Francis Xavier University | Canada  
**David Washer** | Ford Foundation | USA  
**Nancy Watson** | Envision Nova Scotia | Canada  
**Sheila Watt-Cloutier** | Independent | Canada  
**Marie Webster** | Clearfork Community Institute | USA  
**Roger Wehrell** | Acadia University | Canada  
**Keith Wells** | Fairview Community Association | Canada  
**Marilyn Wrenn** | Center for Economic Options | USA  
**Barbara Wyckoff** | Dynamica Consulting | USA  
**Juwaheer Yusuf** | The Eritrean Youth Collective | Canada



# Appendix 3: Feedback

Feedback from the forum has been very positive. Between 77% and 95% of participants ranked individual components of the forum as “Excellent” or “Good”, and all forum elements received overall ratings of “Excellent” or “Good” in excess of 90%:

	Average rating	% of “1” or “2” ratings
<b>Ratings by component</b>		
Welcome dinner	2.01	77.5
Monday setting the stage	1.44	91.1
Monday panel	1.29	93.3
Case study discussions	1.23	95.7
Monday plenary	1.56	85.2
Tuesday setting the stage	1.63	83.3
Thematic discussions	1.70	85.9
Innovations marketplace	1.59	81.3
Tuesday plenary	1.65	80.6
<b>Overall ratings</b>		
Organization of the forum	1.24	95.7
Opportunities to share your experiences with others	1.45	94.6
Connections with a diversity of participants	1.38	93.5
Relevance of resource materials (case studies, tools)	1.22	97.8
Knowledge and skills you gained during the forum	1.67	90.3

*Ratings: 1 = Excellent; 2 = Good; 3 = Neutral; 4 = Fair; 5 = Poor; 6 = Non-attend (excluded from calculations)*





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