

November 5, 2009

Mr. John Cawley
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Dear John:

Unlike past reports that focused on our activity areas (convening, influencing policy, knowledge mobilization, and promoting sustainability), this report is framed around the “complementary interventions’ described in our project description and about which we have had frequent discussions of late, no more so than at the recent workshop in Calgary at the PFC conference. These interventions include:

- creating dialogue with policy makers that leads to action from various levels of government
- developing collaborative relationships and a shared perspective among the community, government and private sectors
- linking academic researchers with practitioners to ensure that research is relevant to community sport groups and influences community action

The report will also describe the on-going challenges at the Sport Matters Group, about which you are familiar, that reflect our inability to align our unusual way of organizing with the growing engagement and cascading results that are derived from this kind and level of participation. Simply put, we need to adapt our model and approach - and our leadership and management – if we are to do no harm and to recalibrate what success means.

Creating dialogue with policy makers that leads to action

As in past reports, this is an evident strength of the SMG – engagement through dialogue being our primary approach to influencing policy. We’ll draw your attention to two significant policy changes that have occurred at the federal level in the past 12 months each of which draws upon this approach, albeit in different ways.

The first such change is the initiation of a series of recreation and sport infrastructure funds, dedicated programs (RInC) and granting streams, brought

forward by the federal government in its 2009 budget and then leveraged up by other partners: provincial governments, municipal governments, community sport associations, community foundations, universities and colleges, and philanthropic individuals or foundations. We now estimate that approximately \$3 billion in capital will be invested over 24 months in sport and recreation community infrastructure as a result of these efforts.

There is a complex story behind how we influenced this budget provision but the simple premise of this 'complementary intervention' is at the root. We had already established the dialogue and relationships that allowed us to react quickly, change direction within our budget advocacy strategy, and intensify our work on this file over the 7 week stretch between the 2008 fall economic update and the early introduction of a stimulus budget in January 2009. As soon as it became evident that the Harper government was signaling its intent to spend through capital, we were ready to provide the necessary information, message, and channels to give sport and recreation a better chance at being identified and designated as a priority stream of investment.

What is less well understood are the conditions that then (as now) existed within SMG as well as those conditions created by the McConnell Foundation. It was upon those conditions that this successful campaign was formed.

On the part of the SMG, we are not locked into traditional planning, governance, and accountability regimes that inhibit such rapid adaptation and change of focus. Indeed, on the day before the economic update, policy advocacy on federal infrastructure spending was on the SMG backburner – the Conservative government wanted nothing to do with this “municipal responsibility.” However, we did have our policy case in the form of the “big honkin document”, a policy capacity group on Infrastructure, political commitments from previous election campaigns, a ready constituency, networks within the public service, provincial and municipal partners in and out of government, and a bit of a vacuum amongst the traditional policy lead on this file.

What we didn't have might have been more important than what we did. No board structure to manage as we changed direction. No programs, projects, or delivery requirements to put on hold. No closed systems to obstruct us in moving to a different priority. Instead, our “unorganization,” as Paul Jurbala describes us, could use its proxies for structure – values, dialogue, relationships, trust – as its foundation for a rapid redeployment and focus on the opportunity. By doing so, we helped to turn a 40 year policy gap – the last federal program of this kind dated back to the 1967 memorial pool and arena projects – into a 7 week campaign and multi-billion dollar investments.

On the part of the McConnell Foundation, having made such a significant and unique investment in the SMG approach, there is also a compelling story. This story begins in the summer of 2006 when the Foundation began conducting its own research and

convened about 20 leaders in Ottawa to distill the core elements of sport and social inclusion.

During this process, a conversation between you and Eric Myles from *Quebec en forme* took many paths, one of which included a simple observation: that public infrastructure and public space is a foundational element of social inclusion in the sport context. While most innovative grantmakers, the McConnell Foundation included, have moved away from strategies that involve capital investment in bricks and mortar infrastructure, few argue that the privatization of the places and spaces where play, recreation, and sport occur is conducive to enhancing social inclusion.

In fact, the McConnell Foundation recognized “creating and protecting public space” as one of the twelve guiding principles for its Sport and Social Inclusion initiative. These principles, in my view, were the key “condition-setter” as they enabled me, in my leadership role at the SMG to park the series of activities and tasks then on our Sport and Social Inclusion to-do-list – things like the Compendium project and the partnership building with 2010 Legacies Now – in order to pursue the principle.

At the time, I didn’t give any thought, perhaps mistakenly, to seeking approvals or permissions or a re-design of the current project or a re-profiling of expenditures. If I had, it’s highly unlikely that I could have been persuasive that this was worth it – the outcomes of this make-it-up-on-the-fly budget campaign being so murky, the future of the government itself in doubt, and the likelihood of success rather slim. It’s also unlikely that we would have had the time to go down that path, the policy process moving so quickly and decisions requiring immediate taking and compromises needing direct attention. In hindsight, the case for action on our part was rather weak but the dialogue and relationships with senior officials suggested otherwise and so off we went with your Foundation’s unstated but principle-dependent direction. What were we thinking?

Actually, it wasn’t thinking so much as feeling. Because the relationships between SMG and the Foundation remain at the centre of this story, a clear strength, an asset for this kind of work and something that I knew I could count on. There is also the McConnell brand, yet another thing that we banked on in adjusting course and parking current projects. The Foundation expressly values this kind of work, actively promotes intelligent risk-taking, and simply relates differently to a Group like ours. Had we been in a conventional funder-recipient relationship, I am convinced this opportunity and this level of investment would never have come about, nor its possibility ever recognized.

People often ask me how we value the so-called “soft” work (dialogue, relationships, connecting) that we spend so much time on – how do you measure it and assign it a value. The obvious answer is that you can’t - it just doesn’t work like that. But when we now hear stories of the renewal of public pools or arenas or parks that were slated for closure, and you listen to what it means for the people in those neighbourhoods, you get a clearer sense of what it’s worth.

The second policy change has none of the theatre associated with the 2009 budget campaign but all the markings of this complementary intervention.

This fall Citizenship and Immigration Canada will release its Call for Proposals through which it will invest over \$600m in initiatives that assist newcomers to effectively settle in Canada. For the first time, alongside activities such as language training and welcome networks, local sport programs for newcomers will be a component of the federal government's settlement strategy.

This policy shift means that local settlement and/or sport groups will have the means to initiate or further develop the sport for development activities as described in the early formation of the McConnell Foundation strategy on Sport and Social Inclusion. Much work will be required to effectively take up this opportunity and apply this capacity in responsible and effective means – this is by no means a cookie cutter program.

But the story for how we got to this point is worth noting. Its roots are in the Working Together Initiative, a platform upon which multiple NGOs and governments share ideas and pursue projects (pilots, knowledge projects, convening) of common relevance. One such project brought together the Coaching Association of Canada, CIC, CAAWS and the Brampton Neighbourhood Resource Centre. \$10,000 was invested to test what sport leadership through coaching could do in a short time span and some modest outputs were achieved. More importantly, the project focused the minds at CIC to learn more about what was possible and what the research literature had to say. Soon enough, they informally asked us to host a group discussion in our board room at SIRC (CIC having no line budgets for convening!) and we put together a useful lineup of local and national leaders to share their perspective.

Follow up meetings, with no direct ask and no seeking of funds for project work, took place with their senior officials, including a champion (Jean Seguin). Additional WTI forums kept us in regular contact and kept the policy leads in a valuable mode of enquiry, lasting nearly a year. We were in no rush and had no needs for them to satisfy, though plenty of opportunity. They were similarly willing to let the process arrive at its own conclusions. You might say that time and patience were more important than knowledge and leadership.

You might also say that influencing this system, not changing it or building it anew, is the key lesson learned from this intervention.

About the other two complementary interventions, I'll be brief.

Developing collaborative relationships and a shared perspective

These interventions – where we find common ground and create momentum within networks – are on-going across many fronts, involving activities that link into other systems and non-sport leadership networks, such as:

- Philanthropic leaders in Canada, as per our recent workshop in Calgary at the PFC conference, where we facilitated a discussion about sport and philanthropy resulting in early signals of interest in collaboration;
- An expanding Social Development Group that has built a conceptual model, initiated a compendium project, and flagged as a priority a system-change initiative for local-community-municipal networks;
- A shared perspective on how to tell our story (of S4D), keep the narrative alive through web 2.0 systems, and locate one another through technologically supported social networks is what the compendium project is about;
- Sustaining the Working Together Initiative platform and seeding the collaborative relationships, as per the example above and as with the Active Circle;
- This summer, we played the lead role in developing a proposal for the building of the True Sport Community Development Centre here in Ottawa. With 30 investor organizations aggregating \$2m in capital, we have gone ahead with an application for \$10m from the Infrastructure Stimulus Fund. If the proposal is successful, our incubation role will wind down and a group of 7 lead organizations will take the project forward, alongside the True Sport Foundation, to build out a first-of-its-kind Centre that bridges local, regional, provincial, and national networks to serve community development goals through sport.
- Initiating work in BC, Ontario, and Alberta to test our ability to extend our relationship building process and collaborative capability to other jurisdictions and communities. In BC, this took the form of leveraging our election campaign expertise into a collaborative effort to shape BC sport policy (www.sportforbc.ca). For Ontario, we are working with the Trillium Foundation and its sport and recreation networks - now our networks to a greater degree - in linking policy capacity building to sport development, and then in turn to outcomes associated with economic development and social inclusion. Discussions are just now beginning with leaders in Alberta about learning from the SMG experiment and applying some of those lessons in community engagement.

- Sport for Development Gathering 2009. This event, the second of its kind, took place at the University of British Columbia over 3 days in June. Some 70 participants, and another 45 more at a social event, engaged in discussion and critique about our common ground of S4D, where we diverged in perspective, and about where our shared effort could or should be applied. UBC was experimental in nature – testing our own boundaries around youth engagement, cross-cultural understanding (sport and recreation, aboriginal and non-aboriginal, diverse socio-economic backgrounds), bridging between research and practice, and debating conventional approaches (charity models) with more progressive approaches (community capacity models) to sport for development. The systemic outcomes were modest – some valuable direction to SMG, some coherence and context for individual work, and some opening up of perspectives amongst traditional players. On reflection, the most valuable contributions might have been about extending our networks and providing continuity – we simply did it again (as we had launched in Calabogie the year before) and by doing so, we affirmed the value of the innovations taking place in the sport for development field in Canada.

Linking academic researchers with practitioners

You may recall from previous reports that our experience of linking research cultures with SMG cultures has been a challenge throughout this project.

At times, we've been concerned that the dominance of the research paradigm could harm the SMG ethic of contribution, shared leadership, and peer relationships. At other times, we've found individual researchers with a growing interest and commitment to working in new ways and we've been more open to learning how our approach could more conducive to research involvement.

The gathering at UBC provided an important venue for us to test whether these linkages will be mutually beneficial and the preliminary signs are positive. Jean Harvey (OttawaU) and Wendy Frisby (UBC) are providing leadership that we ought to build on in the coming years. And some of the younger academics, like Lindsay Hayhurst, are challenging some of our assumptions while we challenge theirs.

But it still leaves open the question of how to have these kinds of linkages at scale or at a more systemic level. It's not enough that some of our leading practitioners have positive relationships with a handful of Canadian academics. This is why we agreed to play a role in the Sport Canada Research Initiative conference this fall. We hosted a 2 hour workshop involving about 120 people – about 25 in policy, 25 practitioners, and 70 researchers – with the purpose to generate solutions that move this network to advance the exchange process across these domains. Next week we'll be rolling up the outcomes of the event but already it's clear that their will be a restructuring of the initiative and some new linking elements (i.e. community – research alliance, with a web platform and personnel assigned to

promote matchmaking between practitioners and researchers) will be implemented in the coming year at a systemic level.

New normal at the Sport Matters Group

Yet another pattern in our irregular reports to the Foundation on the Sport and Social Inclusion strategy is the challenges we are facing at Sport Matters.

Ironically, the very same things that are creating our successes as an “unorganization” are proving to be systemically problematic. All of that fluidity, flexibility, responsiveness, leadership engagement, embedded policy capacity in the sector, connectedness, and appetite for this way of working, is swamping our coordinating capacity and exposing our management weaknesses. As you’ve noted, even the minimum specs aren’t being addressed in a timely or professional manner. The field is clearly advancing. The policy gains are unprecedented. The complementary interventions are adding value across the many projects and community initiatives. The exchange and interaction that we promote is yielding important returns. Sport Matters as a mechanism, experiment, or process is very much on track. But the Sport Matters operations are not.

The remedies for this resemble what we’ve noted in past reports and in planning documents previously shared (i.e. New Normal in Action). In my view, this approach will focus the Group, provide us with capacity and discipline, and allow the SMG to turn the corner in the coming 6 months. I’m also of the mind that it’s the right time to re-profile the senior leader role and initiate a succession process that benefits from what other networks like ours have learned. My growing sense is that we need a new set of skills that can harness and manage the many opportunities that we’ve developed over the past number of years, rather than the competencies associated with mobilization. Prior to the holidays, we are pulling our “admin group” together to consider these conditions and we would benefit from your reflections having worked with so many groups that have successfully navigated these kinds of transitions.

In closing, we’d like to thank you for your support for the past year, and more. You’ve been more than generous in how you’ve supported the field and you’ve been a critical friend to Sport Matters. This critical role is crucial, in our view, and something that helps us to be better. Frankly, we could use more of it, not less!

With best wishes,

Ian Bird
Senior Leader
Sport Matters Group

November 23rd, 2009

Mr. Ian Bird
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Dear Mr. Bird:

Thank you for your letter of November 5th and the enclosed report for the Sport Matters Group's *Sport for Development* project.

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We have noted the following highlights from your report:

- **Quality of the report:** Your report is very useful for the Foundation. You could have mentioned a lot more activities that SMG undertook and outcomes that were realized. However, by telling the story of two initiatives and exploring the dynamics and relationships behind these activities, the Foundation is able to learn more about **how** change takes place and our role in supporting it. With your permission, we may wish to put portions of it up on the web site.
- **Infrastructure story:** The practical outcome of SMG's influence on the policy process was the inclusion of sport and recreation facilities as part of the infrastructure investment fund of the federal government. Down the road it will result in hundreds of new or renovated facilities. While the Foundation is not interested in making capital investments in these infrastructure projects, we do recognize that they are sometimes a precondition to practicing good community sport. As the infrastructure gap begins to close, perhaps we can shift the dialogue to exploring what kind of sport is taking place inside those facilities.

Equally interesting was the story of how SMG was able to influence the policy framework related to the infrastructure file; it was not really on our radar screen or an expected outcome. However, you identify the strength of the SMG approach:

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- A network of relationships across the sport spectrum (NSOs to community sport organizations) and throughout government that share certain values and desired outcomes;
 - A solid body of research into relevant issues. That allowed SMG to frame issues, suggest processes and people to consult with when the government was scrambling to put the infrastructure fund together;
 - An “un-organization”: The absence of limiting structures and procedures allowed SMG to shift gears rapidly. This loose structure and flexibility might make it appear that SMG is not strategic, that it merely chases ambulances in a reactive way. On the contrary, the strategy is to identify some key areas and work on them simultaneously, shifting resources as opportunities appear.
- **Relations with the Foundation:** We understand that you appreciate the role that the Foundation has played in creating space for this approach. To balance this view, I recall that we put SMG through the wringer at the front end; you had to resubmit your proposal to the Foundation several times over 9 months and we pulled it from consideration at three consecutive Board meetings. Why? Unlike fairly straight forward community sport projects that deliver obvious benefits (cute kids kicking soccer balls), SMG is providing leadership at the policy level and mobilizing community sport organizations to change the mindset and structures around community sport – pretty nebulous goals. This meant resisting the funder’s tendency to pin down outputs and outcomes in advance, accepting that priorities would emerge over time, *that measuring outcomes is not always the most important outcome*, to use Sherri Torjman’s expression. The outcomes have been exceptional but we had no idea that changes to tax laws or the infrastructure fund were even on the horizon when we started and we do not know what the outcomes will be in 2010 – 2011. What we have learned is that a group of people with a strong values base and a capacity to mobilize significant numbers of people around well-defined issues can accomplish a lot. This is worth remembering as we seek to engage leaders in other domains.
 - **Convening:** One of the skills of SMG that comes through in your report is the power of effective convening. Many government departments dread interacting with community sector organizations because it is either an ambush to attack the government, an opportunity to ask for funding or a weird combination of both. SMG now has a track record of creating a safe space for genuine dialogue where narrow organizational and partisan interests are left at the door. I have noticed the same dynamic in our

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annual S4D gatherings: the unspoken tension between the recreation and sport folks was constructively surfaced, an academic researcher had to try and explain the relevance of his research to three 18 year old Aboriginal athletes or an Olympic athlete had to connect with a homeless soccer player. The measure of success is unlikely to be evident during the 3 day gathering but it does show up in changed language, broadened mindsets and future collaboration. The best example of this is the emerging cooperation between sport practitioners and researchers which probably would not have happened without some of the relationship building and airing of frustrations that took place in Vancouver.

- **Sport Matters group: the New Normal.** In many ways SMG's capacity challenges stem from its success; each successful campaign or intervention spawns three new requests from stakeholders. I agree that you may need to institutionalize some of the activities that you have been doing for several years – budget input, election campaigns, policy reviews, etc. They can now be part of a regular planning process. However, the competencies of mobilization are very much part of the SMG magic. They just may need to be focused on the more innovative parts of your work. It may be time for co-leaders: one focused on managing a set of more predictable events and interventions, the other developing the relationships and marshalling the research for the opportunities of the future. We know from the infrastructure story that several years of R & D went into preparing for a moment that came suddenly and unpredictably.

Another option to consider is having SMG become the policy / community mobilization wing inside a larger organization. There are obvious management benefits but it would be important to safeguard the "honest broker" credibility of SMG.

Finally, I must confess that I flinched when I saw the word "succession", even if it is a year away. You are a key part of the success of SMG. There are examples of well-planned and invigorating succession processes; Santropol Roulant comes to mind. Finally, I am pretty sure that if you formally leave SMG, like Victor, you will continue to be a key spokesperson for and contributor to the movement.

- **Financial reporting:** In your report you mention that the Foundation has tolerated SMG's management weaknesses. While it is true that your reporting is often several months late, I am reluctant to dwell too much on

the bureaucracy of the grant; a day spent on reporting is a day less of convening or networking. Secondly, I feel very well-informed because we

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are in such regular contact. It does mean, however, that you have been incurring expenses without sufficient revenues from the Foundation. I think that this written reporting process not only helps the Foundation stay in the loop but fosters reflection on your part. Given the level of productivity of SMG, I would like to propose that you report next July and then again in the spring of 2011 at the end of the grant.

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We wish you continued success with the project and will look forward to future reports on its progress.

Yours sincerely,

John Cawley
Senior Program Officer