

Planned Lifetime Advocacy Network (PLAN) was founded in Vancouver two decades ago by the parents of children with disabilities, inspired by the leadership of Al Etmanski and Vickie Cammack. Prior to establishing PLAN, Al and Vickie had worked on disability issues for over 30 years in different non-for-profit organizations. Al was an Executive Director of British Columbia Association of Community Living - a federation of organizations that advocates for the inclusion of people with developmental disabilities in different aspects of community life. In 2003, Al was elected to the Ashoka fellowship for his efforts to improve the quality of life and security of people with disability through the innovative solutions. Vickie was a founding Executive Director of the Family Support Institute – a province-wide organization that supports the families that have a member with disability. During these years, Al and Vickie realized that the advocacy work and the focus on human rights would not by itself change the lives of those with disabilities, who were still isolated and lonely. Al and Vickie wanted their children to have a secure and happy life. They also wanted them to be full-fledged members of society, making their own contributions, not primarily defined by their needs for special attention, services and care. PLAN worked to develop a different concept of disability, focusing on the gifts that people with disabilities have rather than on their deficits. They defined a secure future for their children as being both financially and socially secure. Social well-being was to be achieved by building a lifelong social network around the person with a disability. Financial well-being involved finding ways to guarantee that individuals with a disability would have sufficient funds to lead a decent life after their parents were gone. In this case, people with disabilities would not be solely dependent on the welfare services and government benefits, but would be able to use their assets in different ways depending on their individual needs and interests.

The idea that people with disabilities were contributors like other members of society injected a breath of a fresh air into the prevailing ideas about disability. As Jack Styan, Executive Director of PLAN, explains: “there were gaps in people’s lives that were not fulfilled by paid

services. People have interests and lives and the services often take the life of their own.” The concept of creating social networks and strengthening the relationships around a person with disabilities caught on with other organizations working in the field. Around 40 organizations in North America, Western Europe, Australia and New Zealand adopted PLAN’s approach of creating social networks. PLAN came to be seen as one of the most innovative organization in British Columbia, and groups across the country began to contact Al and Vickie to learn how to replicate PLAN and establish affiliate organizations. Through the replication of the PLAN model, more and more people with disabilities could benefit and improve their lives.

Al Etmaski and Vickie Cammack were at the forefront of this expansion of PLAN, dedicating most of their time to the affiliates. But Al recalls feeling frustration and despair, in spite of this apparent success. He and Vickie began to doubt whether multiplication of the PLAN model was the right focus for their energies. They did not want to improve the lives of *more* people with disabilities, but rather to make a difference for *all* of them. This ambition required different, more strategic, goal-oriented and forward-looking action. But what was the alternative route? And if they took this route, what would happen to their affiliates? Still, Al and Vickie felt strongly that to affect everyone with disabilities they needed to challenge the existing system, and to put their creative energy into changing it. This meant shifting the responsibility for the replication of PLAN to others and shifting their attention to the policy level, with the goal of changing the underlying structures or institutions, such as social assistance regulations and adult guardianship legislation, that had fostered the exclusion of the disabled.

What they knew was that, while parents were able to work on securing the social well being of their children through strengthening their social networks, the financial future of most people with disabilities still remained extremely insecure. Existing legislation provided no financial mechanisms to help families secure the long-term financial future for their children with disabilities.

The only way that families could take was to create a trust fund. However, in most cases each dollar received from the family and friends would reduce the welfare benefit by a dollar for a person with disability. Therefore, the financial assistance from the family and relatives did not result in any additional benefit for a beneficiary. Consequently, the welfare benefits ensured that people with disabilities received certain amount of income, but the existing regulations made it almost impossible to rise above these benefit levels. Al and Vickie therefore decided to direct their efforts to filling this gap, seeing it as a chance to create significant and positive change for *all* those with disabilities and their families.

Initially, the concept of a new financial mechanism was quite broad: enable families to plan the financial future for their children. Etmanski saw an opportunity to partner with the Law Foundation of British Columbia, which was looking for interesting arenas for the law reform. Al worked hard to engage the Executive Director, Wayne Robinson, who came from a social-work background and was sensitive to the potential of Etmanski's proposal. Eventually, the Law Foundation provided funding of CAD 400 000 for a five-year law reform campaign that allowed PLAN to conduct background research, mobilize support, develop awareness of the problem and its proposed solution, and produce briefing papers. Robertson recalls that he was very impressed by Al and Vickie, who worked much harder at building relationships with the Law Foundation during the proposal submission process compared to the other grant applicants. He described them as "inspirational, talented people" who are "incredibly articulate, passionate, fabulous spokespeople for the cause" and have a cause that "nobody can dispute." Robertson admitted that this was the best law initiative that the Law Foundation of British Columbia has ever supported.

The assistance from the Law Foundation of BC enabled PLAN to elaborate their idea of creating a financial security mechanism for people with disabilities. Eventually, the concept of the

Registered Disability Savings Plan (RDSP) was developed.¹ PLAN approached the establishment in Ottawa with their proposal. The primary targets were the Ministry of Finance and the Human Resources and Skills Development Canada. PLAN contacted not only bureaucrats and key administrative staff, but also political advisors to the politicians and cabinet ministers, as well as the Prime Minister’s Office. However, despite all these efforts, “everybody agreed that they were good ideas, but nobody did anything about them,” recalls Jack Styan. Al and Jack decided to turn to their contacts in the business and legal communities for feedback and were advised to provide a financial analysis of their new initiative. Consequently, in 2005 PLAN collaborated with a number of scholars and researchers, including Dr. Richard Shilington (Researcher and Policy Analyst), Dr. Keith Horner (Researcher and Policy Analyst), and Dr. John Kesselman (professor at Simon Fraser University and Canada Research Chair in Public Finance) to further refine the concept of the RDSP. As a result, two reports – Disability Savings Plan: Policy Milieu and Model Development and Disability Savings Plan: Contribution Estimates and Policy Issues – were produced². The reports analyzed the following issues: current tax assistance for families trying to secure the future, existing social assistance policy, policy motivations and barriers for families, policy precedents and options for reform, demographics of prospective beneficiaries of and contributors to a Disability Savings Plan, potential use of Disability Savings Plan, estimated cost of implementation to government. With two independent assessment reports in hand, the RDSP received a very different response. Jack Styan recollects: “People spoke to us with a different tone; they acknowledged that not only was it a good idea, but that they should do something about it. The attitude changed when we could quantify our proposal.” Clear illustration of the potential benefits of the RDSP and the comparison

¹ Registered Disability Savings Plan (RDSP) enables parents and others to provide some long-term financial security for a person with a disability by making a lifetime contribution of up to \$200,000. While contributions to the plan are not tax-deductible, the resulting investments accumulate tax-free, and are not included in income when paid out of the RDSP. (from: http://www.rhdcc-hrsdc.gc.ca/eng/disability_issues/disability_savings/index.shtml)

² The reports are available online: <http://www.rdsp.com/sections/what.html>

of the anticipated amount of contributions by Canadians with the costs to the government made the reports more convincing to the public officials.

Through contacts in Ottawa, the RDSP was brought to the attention of Paul Martin, leader of the Liberal Party of Canada. When it was included in the disability platform of the Liberal Party during the 2006 federal election, the institutionalization of the RDSP seemed within reach. Disappointingly, the Liberal Party was defeated and the Conservative Party formed the government. Once again, the RDSP was shelved.

Then one of the PLAN's lifetime members, David Cohen, was diagnosed with a brain tumor. He had a very strong and rich network that surrounded him with warmth and care during the last months of his life. Without this, he would have been alone in the world. The Canadian Broadcasting Corporation documented this story and aired it after David Cohen's death. The audience responded with interest and PLAN received many phone calls from viewers inquiring about PLAN's work. One of those who saw the documentary was Sean Moore, who previously provided PLAN with the advice on how to work in Ottawa. He contacted Al and Jack to enquire about developments with the RDSP, and advised them to go back to Ottawa to advocate for the initiative. Once again, PLAN was actively campaigning for the financial future of people with disabilities.

Al Etmanski's now extensive contacts in government helped him to advocate for the RDSP within the federal bureaucracy, with the result that the initiative became a government priority. The Minister of Finance appointed a task force to develop the specific arrangements of the RDSP. This led to the drafting of legislation, and eventually, in 2008, to approval by Parliament. After six months, the regulations governing the RDSP came out and the process shifted to the implementation stage.

Innovations may take different growth trajectories depending on the strategies chosen to maximize their impact. Walker et al. (2002) present four different strategies of growth, defined in terms of the novelty of the product or service and the market it occupies (see Figure 1). *Incremental* growth occurs when an organization continues to supply customers with the same product or service, but tries to encompass a larger share of the market. *Evolutionary* innovation involves introduction of a different product into the same market, while the introduction of the same product into a new market is termed *expansionary* innovation. Finally, some organizations try to increase the impact of their innovations by changing both the product and the market. These are *total* innovators. The strategy of total innovation is undoubtedly the most challenging, and potentially requires an organization to reinvent itself.

		MARKET	
		<i>Same</i>	<i>Different</i>
PRODUCT	<i>Same</i>	Incremental Growth	Expansionary Innovation
	<i>Different</i>	Evolutionary Growth	Total Innovation

Figure 1. Four strategies of scaling out

Source: After Walker, R. M., Jeanes, E. and Rowlands, R. (2002) Measuring innovation: Applying the literature-based innovation output indicator to public services. *Public Administration*, 80(1), p. 204.

What Etmanski and Cammack did in their efforts to create and implement the RDSP was not simply to prepare a different product for a different market (total innovation). Instead they took aim at *system change*, inventing new institutional arrangements that would support the long range vision that their initial innovation, PLAN, was created to achieve: the true engagement of people with disabilities. System change happens through *system innovation*. The latter can be defined as a complex process of introducing new products, processes or programs that profoundly change the basic routines, resource and authority flows, or beliefs of the social system in which the innovation occurs. Unlike the strategy of *scaling out*, system change does not aim to reinvent the organization and its mission, or take on a new mission. Rather, system change is propelled by the recognition that for the initial innovation to be resilient, the system which created the original problem needs to be changed at broader institutional levels. We term this process *scaling up*. Unlike scaling out, scaling up involves a deliberate effort to change the ground rules of the broader social context – political, cultural, or economic.

The Registered Disability Savings Plan is a good example of this kind of scaling up, or “fifth strategy.” Not only did it involve total innovation in the form of a new financial mechanism to address the needs of people with disabilities, it sparked a new dialogue about the notion of belonging, and also surfaced other social issues that required response – for example, the need to reform the adult guardianship laws in British Columbia. PLAN led a reform of adult guardianship legislation in British Columbia that resulted in the introduction of the Representation Agreement Act in the Province. Representation Agreement Act enables a person with disability to choose a representative who will help him/her in managing various issues related to health care, money management, personal help, receiving legal help. Unlike a guardian, a representative does not take over the affairs of the person with disability but only helps him/her in making-decisions. Therefore, an individual with the disability is in the center of any decisions made. These changes enabled the

social networks created around a person with disability to become more than friendships and gain a legal status to help those with disabilities in making important decisions.

In the process of addressing the specific needs of a certain social group, the RDSP began a process of changing people's views and perceptions of disability. Because the RDSP gives individuals with disabilities buying power in the market, it begins to dissipate the view that they are primarily recipients of financial or social support. As they merge into the mainstream economy, they are seen as contributors with their own interests, ideas, and viewpoints.

As part of this effort to influence the broader cultural context while working to change legal and economic institutions, Etmanski and Cammack created a new organization, Philia. The discussions about how to include the marginalized people in our society by appreciating their gifts and diversity and how to create a greater capacity to care led to the creation of Philia in 1999. The financial support for this endeavor was provided by the J. W. McConnell Family Foundation. Under the umbrella of Philia, Al and Vickie identified "thought leaders" whose popular political and social writings were read by large numbers of people. They were invited to participate in dialogues on the concept of citizenship. What is citizenship based on? What does it mean to belong? How can we reconstruct our definitions of citizenship so that they acknowledge the rights *and* responsibilities of *all of us*? The reach of these questions encompassed not only people with disabilities, but anyone who was marginalized in some way – the homeless, people with addictions, minorities. Later, Etmanski and Commack tracked the writings of the thought leaders who participated in the dialogues to see if these ideas appeared there. They had some success. In Al's view, profound systemic change has more to do with voice than with administration. He still believes strongly that the most important role of PLAN is to *frame* change in ways that alter the way our society understands the world.³

³ Adapted from Westley et al., 2006.

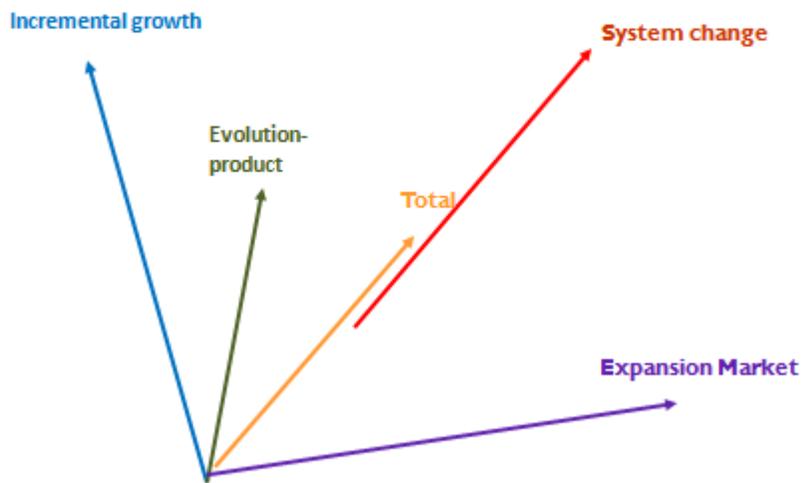


Figure 2: When scaling out becomes scaling up

Designed to strengthen the impact of the other forms of innovation, system change strategies are on a different scale or order (see Figure 2). The example of the RDSP suggests that a total innovation can be a stepping stone to changes in the broader system – but only if its scale and objectives are deliberately extended in this way.

When social entrepreneurs are engaged in system change, their activities change and different competencies are required for success. We use the term *institutional entrepreneur* to describe this constellation of strategies and competencies, which are different from those used to launch individual innovations. Institutional entrepreneurs like Etmanski and Cammack have the capacity to shift their focus and engagement to the whole system, based on certain realizations. First, they are *aware and tolerant of the cyclical nature of innovation*. At the very height of demand, when the obvious response would have been to push for additional chapters of PLAN across Canada, AI reinvented his

strategy. He was exhausted by the prospect of endless replication, which would stretch his and PLAN's resources even further. More importantly, he recognized that it was not the most direct route to his ultimate goal: profound system change. He embarked instead on a new cycle of initiatives, which included the RDSP and Philia. Al's and Vickie's goal was ambitious: to change the very social context of people suffering from disabilities. To that end, they were willing to try numerous routes and work to overcome obstacles, in some they combined the arrogance of goals with the humility of means. Al and Vickie were able to secure the necessary pool of social capital by connecting to the people with resources, building alliances, and engaging powerful allies.

Secondly, achieving system-wide impact involves *managing for emergence*. In the case of PLAN, this had two quite distinct but related elements. The first was *paying careful attention to possibilities as they open across a social, cultural, economic, and political landscape*. For social innovation to be scaled up, such opportunities must be recognized and seized. If not, an innovative idea may never go beyond private discussions among the interested individuals. Al and Vicki were tuned to recognize opportunities and seize them. The second element of managing for emergence is the *nurturing of resource and action networks*. They invested considerable energy in developing and maintaining their links to policy makers, business people, and those with cultural influence, working hard to identify individuals with personal or professional connections to the disability issue. This allowed them to quickly mobilize the resources they needed in order to anticipate and respond to the opportunities. When new conditions emerged unexpectedly, they were able to reframe possibilities and catalyze alternative network links. Thus, when the Liberal Party lost the election of 2006 and the adoption of the RDSP seemed to lose ground, the emerging opportunity of starting a new dialogue was instantly seized by Al Etmanski and the PLAN team.

The case of PLAN Canada showcases the role that the institutional entrepreneur plays in parlaying an innovation into a system change. When social sector organizations move to total innovation, as PLAN did with the RDSP, it can signal a larger agenda aimed at disrupting the broader economic, cultural, or political system in order to create a better context for smaller scale innovations to succeed. PLAN's original innovation was to create a circle of support around a person with disabilities, providing that person with increased security and connection to community. The RDSP and Philia, with their intention of changing broader financial conditions and cultural values, enshrined this notion of a better life in a reality of greater participation in the mainstream culture, bolstered by greater economic security.

With strong social networks and long-term financial security, people with disabilities can become full-fledged members of civil society, able to buy products and services, to participate in social life, and to make their chosen contribution. Though society's beliefs and perceptions take time to change, institutional entrepreneurs dare to set ambitious goals and have the competencies to catalyze change at the system level, working across different scales and boundaries and collaborating with the network of involved actors. Unless a novel idea travels from the individual up to the institutional level, it will not achieve durability and broad impact.

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