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Community Roles in Policy

by

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*This paper was prepared on behalf of Vibrant Communities,
the pan-Canadian initiative to reduce poverty.*

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Introduction

There has been growing interest in recent years in place-based interventions and their unique contribution to tackling complex issues, such as poverty. These challenging problems cannot be resolved through single solutions or one-off responses.

Place-based strategies are exactly that – a range of efforts that seek to achieve a desired objective through interventions in the neighbourhoods and communities where people live. Place-based efforts, which are sometimes referred to as ‘comprehensive community initiatives,’ typically involve the creation of a group or local governance body that takes responsibility for convening key actors and managing the wide range of required interventions. It usually consists of participants from diverse sectors who oversee the development of a strategic plan, which subsequently guides the various components of the work around the identified concern.

The strategic plan formulated by or on behalf of the comprehensive community initiative sets out the desired goals, possible pathways to achieve those objectives and actions to be taken in respect of those goals. The strategic plan generally involves a statement of the logic or underlying argument that underpins and helps guide the flow of the plan. It consists of actions that both raise awareness about the concern and intervene directly in the problem. In the case of poverty, for example, these actions may include setting up a training program, helping low-income households build assets through matched savings and constructing new affordable housing.

Increasingly, however, place-based interventions are also trying to influence selected public policies germane to their identified issues. The purpose of public policy is to achieve an objective, set by an elected or designated body, which is deemed to be in the public interest. Desired objectives include, for example, clean air and water, decent and affordable housing, good health, high educational attainment, improved literacy, robust employment, innovative economic measures, reduced poverty, low crime and a socially cohesive society.

This paper explores the various ways in which communities are engaged in policy through formulating, modifying or seeking improved access to public programs and services. Communities are also becoming involved in designing local space and shaping the context relevant to their specific concerns.

The purpose of this exploration is both to showcase the exemplary work under way in the country and to share these efforts with other communities. The examples draw primarily, though not exclusively, from policy work related to the pan-Canadian Vibrant Communities initiative that seeks local solutions to reduce poverty. However, the types of policy interventions described here can apply to other areas as well, such as crime prevention and neighbourhood revitalization.

There is a cluster of strategies that help reduce poverty [Torjman 2008]. These are described elsewhere and include:

affordable housing which involves the creation of new units, property retrofit and/or rent supplementation

early childhood development initiatives, including sufficient affordable high-quality child care

improved high school completion rates and literacy proficiency

demand-driven customized training that engages the private sector, training institutions and employment programs, and the removal of employment barriers, particularly for foreign-trained workers

improved minimum wages and enhanced supplementation of low earnings through the federal Working Income Tax Benefit and provincial earnings supplements

better income security through federal and provincial/territorial child and elderly benefits, and reformed provincial/territorial social assistance systems

stronger replacement of employment earnings through a restored and improved unemployment insurance system

adequate income and appropriate supports for persons with disabilities

assistance with the creation of assets for low- and modest-income households through savings plans and support for the social economy

establishment of strong social infrastructure in the form of community spaces and associated recreation and cultural programs

place-based initiatives that fashion integrated and effective responses to tackling poverty through creative combinations of resources and approaches.

While communities are pursuing a range of interventions in each of the above areas, they are recognizing increasingly that the problems faced by individuals and households living with low income often result not from their own weaknesses but rather from problems and barriers in the broader economic and social system. For instance, many Canadians work for wages that fall below poverty levels. They may have increased their incomes slightly by moving from welfare to the workforce only to find that this modest additional amount disqualifies them from other assistance or results in a loss of benefits from certain programs. Or they may want to enroll in a training program but are unable to find high-quality, affordable child care.

These examples are considered systemic problems in which the barriers that arise tend to be embedded within the programs and services themselves. The appropriate interventions therefore need to be addressed at a policy level.

Communities are also recognizing that public policies, especially in the form of income security programs, play a major role in tackling poverty. It is therefore important to focus some attention on improving the measures that can make a substantive and immediate difference in people's lives.

The power of policy interventions stems from the fact that positive changes can touch not just one or several households. Depending upon the nature and scale of the policy measure, the lives of hundreds, thousands or even hundreds of thousands of Canadians can be affected.

In the quest for adequate incomes, for example, the living wage campaigns in which several Vibrant Communities partners are involved affect all the employees of a given company. Such campaigns may reach an even larger percentage of employees within an entire region if the City Council passes a living wage ordinance that applies to a broad spectrum of employers and suppliers.

Because of their potentially large broad reach, policy interventions represent scale. They are a significant way to extend the scope and impact of community efforts. The down side of policy efforts is that they often require extensive time and resources, and there is no guarantee at the end of the day of any policy change.

Substantive shifts in policy can also take a long time to effect. Funders looking for immediate short-term results are typically not interested in supporting this work. The many challenges involved in public policy reform are considered more fully below.

This paper discusses ten major types of policy activities in which communities can engage. While each stream is described as a unique intervention, they are not mutually exclusive, and communities can be involved in one or several of these actions at the same time. Core policy interventions include the following:

- monitoring policy developments
- building an evidence base
- enabling access to existing benefits
- improving programs and services
- creating new programs or services
- reducing basic costs
- designing appropriate environments
- creating contextual change
- reducing barriers and disincentives
- assessing policy impact.

Policy Roles

1. Monitoring policy developments

Most community initiatives make an effort to keep abreast of major policy developments – particularly those of direct interest to their stated objectives. Local efforts involved in employment, for example, tend to follow changes in the areas of training, minimum wages, labour standards, Employment Insurance and welfare policy.

But the monitoring process is often informal. Many communities would not even claim that they track policy changes in any systematic way. They often learn about major developments through media reports – typically after new measures have been announced. They are basically in a reactive position – effectively receiving news about a shift that has already occurred and likely will be in place for years to come.

Increasingly, however, some communities are engaging in more active and deliberate policy monitoring in which they develop a methodology for following relevant changes and carry out this work on a regular basis. The Hamilton Roundtable for Poverty Reduction, for example, has created a matrix which tracks relevant policy changes at the federal, provincial and local levels. The selected developments are monitored according to five categories of actions that the Roundtable has identified as key levers for poverty intervention. http://www.caledoninst.org/Special_Projects/CG-COP/Docs/HRPR_Policy_Matrix.pdf

While the initiative bills itself as a poverty reduction effort, it is effectively taking a long-term, generational approach by targeting the well-being of children as its pivotal point of intervention. The strategic framework formulated by the Roundtable places children at the centre of a series of linked interventions concerned with individuals, families, neighbourhoods, communities and government policies. The framework identifies five critical points of investment along the pathway from birth to young adulthood – quality early learning and parenting; skills through education, activity and recreation; targeted skills development at the postsecondary level; employment; and asset-building and wealth creation. The Roundtable is exploring community investments at all these significant leverage points.

Quality Early Learning and Parenting includes, for example, the City of Hamilton Child Care Wait List Management Strategy and the Best Start Consultation for the Ontario Ministry of Children and Youth Services. *Skills through Education, Activity and Recreation* lists the federal Child Fitness Tax Credit and the City of Hamilton Arts Master Plan. *Targeted Skills Development* makes reference to the Roots of Youth Violence Consultation and Youth Opportunities Investment of the Ministry of Children and Youth Services. The Living Wage Procurement and Policy Affordable Transit Pass Program of the City of Hamilton are among the key *Employment* measures. *Asset Building/Wealth Creation* points to the Homelessness Strategic Plan and the 2006-08 Budget Planning Process for the City of Hamilton.

The Roundtable also tracks relevant activities, conferences and reports that pertain to poverty reduction even though they do not represent actual policy shifts. In addition to

monitoring policies, activities and reports relevant to the five major intervention strategies, the Hamilton Roundtable follows key developments related to the Ontario Poverty Reduction Strategy announced in early December 2008. The Roundtable documented major proposals on poverty reduction put forward by national and Ontario networks including Campaign 2000, 25 in 5, the Social Planning Network of Ontario and the Ontario Municipal Social Services Association. http://www.caledoninst.org/Special_Projects/CG-COP/Docs/Ontario_Poverty_Reduction_Strategies.pdf

As part of a Community of Practice on Collaboration, the Caledon Institute formulated in association with five local and two university partners a process for tracking relevant federal and provincial social policy developments. This work has not been easy because each partner has unique information needs and we learned early on that a single approach does not fit all. The process has proven, however, to be invaluable for identifying changes in such areas as affordable housing, Employment Insurance and income security. Significant shifts in these areas are now incorporated in relevant reports. http://www.caledoninst.org/Special_Projects/CG-COP/Docs/Federal_Policy_Updates_September.pdf and http://www.caledoninst.org/Special_Projects/CG-COP/Docs/Provincial_Policy_Updates_November.pdf

2. Building an evidence base

One of the major components of policy work involves the development of a solid evidence base to explain the nature of a complex problem and the importance of taking multiple actions to tackle it. The evidence base ideally includes both quantitative and qualitative information. It provides material that describes to both policy-makers and the general public the extent and scope of the identified challenge. The evidence also helps make the case for the proposed intervention(s). The evidence base raises awareness of the identified issue in order to create a supportive context for policy and program changes.

All partners in the pan-Canadian Vibrant Communities initiative have been engaged, in some way, in making the case for local intervention in poverty reduction. While the work of each community is a story worth telling, a few selected examples are presented below.

Each community employs a unique process of gathering relevant information – though they all collect numbers, and trends where available, on the rate and/or depth of poverty in their respective region. The rate of poverty refers to the percentage of households below the poverty line in a designated area. The depth of poverty measures how far below the poverty line, on average, that low-income households fall.

Sometimes communities provide further disaggregation by breaking down the figures by specific groups in the population. This breakdown helps describe the face of poverty – by highlighting groups that tend to have disproportionately high rates, such as racialized youth in Toronto.

In addition to numbers, communities often try to describe the face of poverty. They supplement quantitative data with stories of the people living on low income. Once communities have developed a poverty profile, they generally seek opportunities to present the information to both policy-makers and the public.

Saint John provides an interesting example of making the case for a major poverty reduction initiative. A coalition of business leaders, known as the Business Community Anti-Poverty Initiative (BCAPI), was formed in 1997. It joined a host of nonprofit and government agencies working to reduce poverty in that city. In 2004, BAPI agreed to act as the convener for the Vibrant Communities project in Saint John. It invited other sectors to the table and more than 80 people representing a diverse array of sectors are now members of the initiative's Leadership Roundtable and associated committees.

While significant work already was under way to tackle poverty in Saint John, resources for that purpose were limited. As a relatively new player in the field, the business group in its voluntary capacity brought an important voice, new energy and sharp focus to the work. The Vibrant Communities organizers in Saint John placed early emphasis on research to understand the factors that contribute to poverty, determine the most effective poverty reduction strategies and target the investment of energy and resources.

In order to deepen its understanding of poverty in Saint John and refine its poverty reduction strategy, Vibrant Communities Saint John joined with the Human Development Council (a local social planning council) and University of New Brunswick Saint John's Community University Research Alliance to produce a baseline statistical report called *Poverty and Plenty: A Statistical Snapshot of the Quality of Life in Greater Saint John*.

Three out of four citizens in Greater Saint John reside in a mixed-income neighbourhood, while one in four citizens live in a vulnerable neighbourhood. More than 50 percent of Greater Saint John's poorest residents are in vulnerable neighbourhoods, with 30 percent living in neighbourhoods considered to be very high-poverty Census areas. This concentration of poverty is significantly higher than in most Canadian communities. More than 60 percent of Saint John's lone-parent families live in poverty. This ratio is the highest among major Canadian cities, and has seen little change in more than 20 years.

The statistical information presented in the report was supplemented by qualitative research obtained from focus groups, interviews and community meetings with people living in poverty. Poor-quality housing, high-cost accommodation, inadequate diet, limited transportation and education levels that make well-paid jobs inaccessible were all found to contribute to a sense of entrapment and the belief that there are too few opportunities for improvement.

In British Columbia, Vibrant Communities Surrey provides another example of community involvement in the creation of an evidence base. Just over 18 percent of Surrey residents lived below the low-income cut off in 2001 and close to 25 percent of families were led by a lone parent. There is no social planning council or other community-based organization in Surrey

through which to conduct multisectoral planning. Beginning in 1999, the United Way of the Lower Mainland, Surrey Social Futures Society and a local task force developed a Community Impact Profile, which made clear the need for an organization that could build collaborative efforts [Makhoul 2007].

In 2001, Community Solutions – a United Way initiative led by Surrey Social Futures – set up a task force on poverty and another on housing and homelessness. Over the next few years, the coalition sought to engage key individuals and organizations in formulating a community vision for poverty reduction.

Surrey is currently developing a Geographic Information System mapping tool that breaks down information to the street level. This Economic Security Mapping Project enables the tracking and cross-referencing of numerous factors – e.g., the location of child care services and providers, libraries and schools combined with existing demographic and anecdotal information.

There are other initiatives throughout the country that are developing their respective evidence bases on a poverty-by-geography approach. A comprehensive report entitled *Poverty by Postal Code* was published in 2004 as part of research into social issues being undertaken by the United Way of Greater Toronto [UWGT and CCSD 2004]. *Poverty by Postal Code* found a substantial rise in the poverty rate among Toronto families over the last two decades, with almost one in five families living in poverty in 2001. The report also mapped the growing concentration of poverty in certain neighbourhoods.¹

These figures on the dramatic rise in neighbourhood poverty are important for several reasons. When combined with relevant research evidence, they tell a compelling story. The multiple risks of living in a poor neighbourhood are significant – and long-lasting – for children and youth, newcomers to the country and the entire community. Poor neighbourhoods often spin into decline, leading to poor health, crime and abandonment by both residents and businesses.

A major study by the Canadian Institute for Health Information found a clear link between quality of neighbourhood and level of health [CIHI 2006]. It concluded that place does indeed matter when it comes to health and well-being. This research adds an important dimension to the case for place-based interventions.

3. Enabling access to existing benefits

It is generally assumed that working on policy involves the formulation of a novel approach or the creation of a new measure. Often, however, significant policy work is carried out by ensuring that individuals and households eligible for certain benefits or services actually know about them and receive them.

A major problem arises from the fact that potential beneficiaries of programs may not be aware of these benefits and may need assistance in completing the required application forms.

The policy work in this case involves identifying the income programs and services for which the individuals and households of concern are potentially eligible. Significant gaps are determined in relation to the individuals and groups not receiving the benefits or services for which they may be eligible. A strategy for reaching those households is then developed.

Several Vibrant Communities partners have undertaken significant work to enable access to programs intended for low- and modest-income households. As part of the *Make Tax Time Pay* initiative, Vibrant Communities Edmonton set out to find effective ways to inform low-income residents about the Alberta Child Health Benefit. This provincial measure provides an average \$265 a year per child for prescription drugs, dental and optical care, and emergency ambulance services.

While the Alberta government had developed strategies to publicize the benefit, take-up levels were relatively low – at just 36 percent of the eligible population in the Edmonton area. An estimated 14,900 eligible residents of the city were not collecting the benefit. In order to rectify this problem, the conveners of Vibrant Communities Edmonton developed relationships with three orders of government: the Canada Revenue Agency, Alberta government and City of Edmonton [Makhoul 2006].

The partners subsequently identified six additional benefit and subsidy programs of which low-income families were likely unaware. The collaborating partners planned a publicity and education campaign, selected and secured tax assistance locations accessible to low-income households, provided the required training and support materials for volunteers, and prepared the infrastructure to handle the higher number of applications. *Make Tax Time Pay* operated in the 2006, 2007 and 2008 income tax seasons.

The Guaranteed Income Supplement (GIS) campaign in Waterloo Region is another example of how communities can work with government officials to enable access to income benefits. Old Age Security provides almost all senior citizens with modest monthly taxable benefits. In order to improve living standards for lower-income seniors, the GIS was introduced in 1967 as a monthly benefit for Canadians who receive full or partial Old Age Security pensions and who have little or no other income. Receipt of the Guaranteed Income Supplement also qualifies low-income seniors in a number of jurisdictions for provincial top-ups.

New recipients of the Guaranteed Income Supplement must apply for this benefit and current beneficiaries must re-apply every year because the payment varies with changes in income. But some seniors fail to file an annual tax return because they do not have taxable income or may have health problems, mental and physical limitations, or literacy or language barriers. It is difficult to identify and contact these individuals if they do not submit a tax return, receive no Old Age Security payment or are homeless.

Representatives from Opportunities Waterloo Region, the conveners of the local comprehensive initiative, formed a strategy group with (the former) Human Resources Development Canada and other organizations to determine how to reach eligible seniors not receiving the

Guaranteed Income Supplement. One group was struck to prepare and distribute materials. The other set up training sessions for social service employees in regular contact with low-income seniors. Both the information and education processes were intended to complement the federal communications strategy [Makhoul 2005a].

This modest policy initiative has helped more than 600 low-income seniors secure the Guaranteed Income Supplement. But its impact is larger than this region alone. Similar efforts have been undertaken elsewhere to ensure access to both the GIS and other measures.

4. Improving programs and services

Another policy area in which communities have become engaged involves the improvement of existing benefits and services. One significant piece of work in this domain was undertaken by Vibrant Communities Calgary, which convened a policy roundtable involving persons with disabilities, representatives from community agencies and provincial government officials.

In the summer of 2003, staff at United Way of Calgary and Area (one of two co-conveners of Vibrant Communities Calgary at the time) began a 20-month process to pilot a policy initiative that would help the Calgary nonprofit sector build and improve relations with the provincial government. In short order, they assembled a working group of eight individuals from a cross-section of organizations and formed the Calgary AISH Public Policy Roundtable. They were joined by two policy consultants, a member of the Legislative Assembly and a senior bureaucrat from the Alberta Ministry of Human Resources and Employment.

Participants were asked to identify problems with the benefits and delivery of a provincial income security program, known as Assured Income for the Severely Handicapped (AISH). The group believed that if government officials understood the difficulties with the program, they would be better able to resolve these concerns or at least to propose compromise solutions.

In September 2004, one year after the Roundtable began its policy initiative, the provincial government undertook a review of the AISH program.² The province responded positively to the review and introduced several important changes, including a rise in benefits, increase in the employment earnings exemption and reduction in the clawback rate on earnings from employment.

In mid-April 2005, the Government of Alberta announced that the AISH living allowance would rise immediately from a maximum \$850 to \$950 a month, and an additional increase in April 2006 for a maximum of \$1,000 per month. It made a commitment to review the benefit level every two years starting in 2007.

The province also agreed to implement recommendations to improve the earning power of AISH recipients by enhancing the employment earnings exemptions for those who work. The full exemption for employment earnings was increased from \$200 to \$400 for singles and from \$775

to \$975 per month for couples and families. The exemption rate was raised from 25 to 50 per cent for amounts above this, to a maximum of \$1,000 for singles and \$2,000 for couples.

The province announced as well that it would provide supplementary benefits to help cover additional medical supplies, accessible transportation, child care and special needs, which previously were not covered by the AISH program. Other recommendations were approved regarding more effective and better integrated services for Albertans with disabilities [Makhoul 2005b].

5. Creating new programs or services

The Quality of Life CHALLENGE in BC Capital Region, coordinated by an organization known as the Community Council, is a multi-year effort to improve the lives of people living in poverty. It also seeks to strengthen the social fabric of the entire community. Not surprisingly, given the geography and economy of the region, affordable housing is a major concern.

BC Capital Region has a rental vacancy rate of 0.6 percent – among the lowest in Canada. At more than \$500,000, it has one of the highest average house prices in the country. Some 22,200 households in the area are deemed to be in ‘core housing need’ – i.e., they are unable to find housing that meets basic standards for adequacy, suitability and affordability. A regional government commitment to limit urban expansion in respect of environmental and agricultural sustainability added to the pressure on the housing supply [Makhoul 2005c].

In response to the accommodation problem, a number of groups and organizations found themselves pursuing – through diverse pathways – common objectives related to expanding the supply of decent, affordable housing in the region. The concerned parties began to realize that they likely could achieve more significant results if they combined their respective efforts into a coordinated approach.

The Housing Affordability Partnership subsequently was established with representatives from the Community Council, BC Housing, Canada Mortgage and Housing Corporation, Canadian Homebuilders’ Association, Urban Development Institute, Rental Owners and Managers’ Association, nonprofit housing providers, Vancouver Island Health Authority, financial institutions, municipal planners and community associations.

The group noted that a serious problem in the region arose from the fact that the 13 separate municipalities comprising the BC Capital Region tended to take individual action with respect to affordable housing. There was no coordinated strategy for coherent investment for the region. This type of disjointed approach is ineffective – especially around a concern like housing that requires both a land use planning strategy and substantial financial investment.

The Housing Affordability Partnership recognized that the current approaches in which individual municipalities focused only on their own backyards was doing little to resolve the

regional problem. The Partnership worked to support the creation of a regional housing trust fund to coordinate the flow of capital into various housing projects. Housing trust funds are set up by local governments or nonprofit agencies to increase the availability of affordable accommodation, including new construction, retrofit of older buildings and rental subsidies.

In April 2005, six of the region's 13 municipalities – which account for more than half its population – voted to establish such a trust fund, contributing a total estimated \$635,000 annually. When all 13 municipalities (ideally) join the Regional Housing Trust Fund, they will contribute \$1 million annually with the capacity to create up to 75 affordable housing units each year. These funds leverage 14 times that amount from provincial and federal governments and other sources.

While significant, there is no question that a trust fund must be supplemented by other measures to enhance the supply of affordable housing. The Quality of Life CHALLENGE succeeded in influencing bylaw changes in seven municipalities, including the use of an affordability lens in assessing new housing developments and the legalization of secondary suites. As a result of these changes, BC Capital Region was able to create a new financial arrangement and influence the relevant context through changes to selected municipal bylaws.

6. Reducing basic costs

Improving income security benefits is one way to tackle poverty. An equally important action is to reduce the cost of basic goods so that lower-income households can keep more money in their pockets. This type of intervention does not focus directly on bolstering household income. But it has a significant impact upon disposable household income by reducing the cost of essentials, such as public transit and home heating fuel.

The first example grew out of work under way in the AISH review, described above. The policy group subsequently built on the goodwill that had been created in the AISH program to work in a related policy area. When the Alberta government was assessing the AISH program, members of the Calgary Committee for Discounted Transit Passes had made submissions to the review committee.

Of the estimated 8,500 people who receive AISH benefits, about 5,000 use public transit. The Committee asked the province not only to increase the program's income payments (then \$855 per month), but also to share with municipalities the cost of providing affordable transportation for all low-income Albertans.

Joining together in 2004 under the name "Fair Fares," Vibrant Communities Calgary and the Calgary Committee for Discounted Transit Passes launched a concerted effort to convince City staff, aldermen and Calgary Transit officials of the importance of reduced fare passes [Makhoul 2005d]. The City of Calgary decided to establish the passes for AISH recipients in 2005 and then extended the program in 2006 to all low-income residents, including AISH bene-

ficiaries, who have been able to apply for a Universal Low Income Transit (ULIT) pass since January 2006. The new measure allows low-income riders to buy passes at half the regular rate, for a savings of \$37.50 per month.

Fair Fares presentations to Calgary's Standing Policy Committee on Land Use, Planning and Transportation in September 2006 helped secure funding for ULIT passes for 2007. But the program's future was not certain. Over the summer of 2007, the Fair Fares Action Team spent time preparing for the City's upcoming decision to continue the pilot program, make it a permanent expenditure or shelve it entirely. Calgary Transit ultimately decided to fund the ULIT passes through to the end of 2008 using surplus funds from 2007.

To help make the case, Vibrant Communities Calgary and Calgary Transit jointly commissioned a study to evaluate the social and economic impact of the ULIT service on pass purchasers. Researchers were heartened to learn that, among the survey's 401 respondents, affordable transportation had the effect of increasing volunteerism, social engagement, learning and participation in the labour force. Respondents also said that the less expensive passes made it easier for them to meet their monthly expenses [Makhoul 2008a].

Vibrant Communities Calgary was delighted to announce that, in November 2008, Calgary City Council approved a three-year business plan and budget that included the continued provision of the Universal Low Income Transit Pass. Its status beyond pilot project has been secured.

Lowering the price of home heating fuel is another example of policy work that seeks to reduce basic costs. Households are deemed to experience energy poverty when they must spend more than 10 percent of their income on basic heat and light. For most middle- and high-income Canadians, energy bills account for about four percent of total household expenditure.

In the City of Saint John, for example, low-income residents spend between 10 and 15 percent of their incomes to light and heat their homes. A large proportion of the low-income earners live in rented apartments constructed prior to World War II. Because these dwellings often rely on baseboard heaters, they are expensive to keep warm.

In 2005, the provincial utility New Brunswick Power announced its intention to raise utility rates by 16 percent. This rate hike threatened to put many more New Brunswick households into energy poverty.

The utility also indicated that it would hold public hearings, for the first time since 1993, on the proposed change. Vibrant Communities Saint John applied for and was granted intervener status in the process. This position helped it gain access to important financial data on energy poverty and enabled the discussion of potential solutions in cooperation with the local utility, Saint John Energy. It was the first time that low-income residents in New Brunswick had a voice at these hearings [Cabaj, Makhoul and Leviten-Reid 2006].

Two significant changes have occurred as a result of the work undertaken by Vibrant Communities Saint John. The utility changed its billing structure away from a block rate that offered volume discounts to high-energy users. Low-income households were never reaching the lower amount and effectively were subsidizing the power rates paid by people living in larger, more expensive homes. The billing practice will be replaced by one that rewards energy conservation.

The second key shift was the utility's agreement that energy is an essential service. Its monthly charge of \$19 was the second highest in the country and the utility was proposing to raise it to \$21. The recognition of home heating fuel as an essential service has opened the door to discussing the impact of rate design on low-income households throughout the province.

Vibrant Communities Saint John subsequently worked with the public utility to find longer-term neighbourhood solutions to energy poverty. These included possible savings through reduced energy use and technology upgrades.

7. Designing appropriate environments

Some communities' policy work enables access to existing benefits. Other initiatives focus on improving these benefits or creating new measures. But there are still other types of policy efforts that involve working with governments to design new approaches or elements of social infrastructure, such as affordable housing.

In early 2005, the former federal Minister responsible for the Canada Mortgage and Housing Corporation travelled across the country to meet with community groups to hear their ideas about the kinds of investment required in affordable housing. Increasing the supply of decent affordable housing is one of the major objectives of Vibrant Communities Saint John, earlier described. Representatives from VCSJ had indicated their interest in securing a hearing with the Minister [Cabaj, Makhoul and Leviten-Reid 2006].

In preparation for the meeting, the Minister's office informed six selected groups that each would have a 10-minute private meeting with the Minister. While the designated groups were pleased about the opportunity, they had problems with the process. First, they did not feel that the time allocation was long enough to have a serious conversation about the complex issue of affordable housing. Second, they wanted to ensure that the Minister heard a common message from the community and that he did not leave Saint John with the impression that there were more areas of dissension than agreement.

Prior to the meeting with the Minister, the groups decided to come together to devise a common strategy. They subsequently determined that the best route would be to request a joint meeting with the Minister. Because each of the six groups had 10 minutes, they realized that it would take no more of his time to meet with all of them together for an hour.

The proposed strategy allowed them all to have more time with the Minister. Equally importantly, it required them to hammer out the joint message they wanted to leave on the table. The preparation ended up being a real turning point because the participating organizations, which subsequently evolved as the Housing Working Group, needed to identify very clearly their strategic direction in terms of affordable housing and the associated priorities.

The joint message that the Housing Working Group eventually developed was quite significant in terms of what it was – and was not. It was not a request for more money for Saint John, at least not immediately until the intended direction of any investment became more clear. The groups decided that, in the short term, the community would benefit most from technical expertise and guidance regarding the various routes for investing in affordable housing.

On the one hand, Saint John has a substantial old housing stock in need of major upgrade and repair. At the same time, this old stock has significant heritage value and ideally should be protected. The challenge facing the community was to figure out how to both update and protect at the same time.

The Working Group managed to convince the Housing Minister of the importance of devoting the time of one Canada Mortgage and Housing Corporation official to help the community design new affordable housing. The Minister responded to the request by designating a staff person from the CMHC to be based in Saint John. That individual worked to raise the profile of social housing needs and to strengthen connections among private, public and community stakeholders. Within a year, Saint John developers had secured government commitment to 100 new affordable housing units.

The addition of the CMHC staff person also helped bring attention to vulnerable neighbourhoods. In the Old North End of the city, for example, the CMHC representative secured funds to organize a five-day planning exercise to help residents envision a better future for the neighbourhood and an associated strategic plan [Bulthuis 2007]. Known as a charrette, the process brought together young and old residents, church groups, nonprofit organizations, landlords, business people and elected political leaders from all three orders of government. A summary report, which included short- and long-term goals, has served as the roadmap for neighbourhood change [Makhoul and Leviten-Reid 2006].

The lesson from this example is important. Sometimes the most immediate and obvious action when engaging with government is to request funds for a given project or cause. While money is crucial, it is not the only form of assistance that helps advance an agenda. There may be a need to spend more time on strategy to determine the best place for subsequent investment. Good planning at the design phase of an effort, and assistance with data, evidence and design, can go a long way toward achieving positive results in the long term.

8. *Creating contextual change*

As noted, policy work is often understood as a process that includes easing access to existing benefits or improving those already in place. But sometimes policy interventions involve work that seeks to change certain regulatory frameworks or voluntary practices that significantly affect people's lives.

Minimum wage, which falls below poverty levels in all jurisdictions throughout the country, is a prime example. One in four Canadian workers makes just \$10 an hour or less, and close to half (44 percent) of low-income families have at least one working adult. The \$8.75 minimum wage in Ontario, for instance, amounts to about \$18,000 for full-time all-year work. Far too many households are employed full time and still live in poverty. They are known as the 'working poor' [Battle and Torjman 2008].

To help address this problem, there have been calls over the years for provinces and territories to increase their minimum wages and to index them to ensure regular increases that keep pace with changes in the cost of living. A number of local efforts are moving beyond minimum wages, however, to convince local employers to pay *living wages* that exceed the bare minimum. The improvement is intended to recognize that many employees are not able to feed their families on their current wages.

Several participants in the Vibrant Communities network have embarked upon living wage campaigns. Vibrant Communities Calgary has led the way in this area. Based on the premise that people who work full time should not live in poverty, Vibrant Communities Calgary (VCC) established a Living Wage Action Team in 2003.³ Members researched Living Wage campaigns launched in Canadian and American cities, and agreed that they would pursue an approach that combined education with legislation. They would encourage private sector, nonprofit and government employers to adopt exemplary human resource practices [Makhoul 2005e].

Members also decided to engage in dialogue with the City of Calgary to promote the inclusion of living wage provisions into municipal pay structures and contracting policies. Given that the City of Calgary purchases \$900 million in goods and services each year, the municipality's leadership would set a good example for other employers.

The "No Sweat Coalition," a grassroots advocacy group, had worked with the City of Calgary for several years to build support for fair wage municipal purchasing and contracting agreements. In 2004, City Council passed a motion that approved the formulation of a Sustainable Ethical and Environmental Purchasing Policy (SEEPP). Vibrant Communities Calgary joined the coalition in 2005. Members made a presentation to City Council to request that funds be directed toward preparing a SEEPP draft. Council approved the idea and, in mid-2006, a consultant hired by the City began drafting the policy and an accompanying supplier code of conduct.

The City of Calgary's municipal elections in October 2007 provided an opportunity to focus on the SEEPP and its Living Wage implications. Vibrant Communities Calgary helped canvass Council members and prepare a communications strategy for positioning living wage as a public issue. It also undertook a new area of work – improving voter turnout, particularly in low-income parts of the City [Makhoul 2008b].

In 2006, VCC received three years of funding from the Calgary Foundation to engage the private sector in the Living Wage Initiative. A total of \$15,000 per year was invested in research and publications that describe the economic impact and benefits of instituting a living wage. They produced *Vibrant Workplaces: Creative strategies to attract and retain Calgary employees*, which profiles local employers that have instituted progressive employment practices.

Vibrant Communities Calgary convened a small group of business owners to discuss how Living Wage provisions might affect their operations. In April 2007, they defined terms of reference and adopted the name Vibrant Workplaces. In November 2007, the group released *Low Wages in Boomtown* that identifies the barriers that prevent low-income Calgarians from moving up the economic ladder.

The research undertaken by Vibrant Communities Calgary also highlighted the fact that finding and retaining workers depends on how well employers address employee concerns. Many of the employees identified low wages as a key problem. Employers that have increased wages have seen improvements in employee retention.

All the hard work paid off. In April 2008, Calgary City Council approved a motion to direct its administration to develop by January 2009 a variety of living wage policies and explore their financial implications. Other Vibrant Communities partners are now involved in pursuing this issue. Opportunities Waterloo Region was pleased to report that, after its presentation to the Community Service Committee, Regional Councillors directed staff to conduct research on the impact of living wage policies. The collective impact of these individual efforts will improve the wages of significant numbers of workers throughout the country.

Another important example of policy work has recently been undertaken. The Fraser Valley Centre for Social Enterprise in BC provides technical assistance to social enterprises, which combine economic and social goals. It has been calling since 2005 for the creation of a new business structure or legal form for social enterprise in Canada.

The idea for a new legal structure was inspired by developments in the UK, which introduced the 'Community Interest Company' in 2005. An estimated 2,000 Community Interest Companies are now registered in that country. In 2008, the state of Vermont brought in the low-profit limited liability company (also known as L3Cs) for the same purpose. The law has national applicability because the L3Cs can operate in any state.

To help make the case for a similar legal structure in Canada, the Fraser Valley Centre secured funding from Coast Capital Savings Credit Union for a research project to explore a new Canadian business status designed specifically for social enterprise. The new status would be in addition to existing business structures in Canada that include corporations, sole proprietorships, partnerships and co-operatives. A new legal status would allow governments to bolster social enterprise through incentives such as tax credits and would enable social enterprises themselves to raise capital by issuing shares.

In this policy example, the community-based organization is involved in and will continue to support a wide range of social enterprises at the local level. The group recognizes, however, that in order to scale up its work both at home and throughout the country, it must focus on changing the foundational regulatory framework that underpins this sector.

It should be noted that the research being undertaken by this group was highlighted at a recent national Social Finance Forum.⁴ The Government of Ontario announced in December 2008 in its Poverty Reduction Strategy that it would be exploring the introduction of a Community Interest Company in recognition of the need for a separate legal status for social enterprise.

9. Reducing barriers and disincentives

The preceding discussion has pointed to the fact that community efforts in policy work can be concerned with far more than the creation of new measures or the redesign of benefits and services. Community efforts in policy work often seek to sort out complex systems that create barriers or problems for low-income households.

There is no more troubled system than social assistance programs run by provinces and territories. Social assistance – commonly known as ‘welfare’ – is the income program of last resort. Households may apply for social assistance when they have no other income or when their needs exceed the resources available to them through employment, government benefits and private sources.

Applicants are expected to deplete most of their liquid and fixed assets before they are considered eligible for welfare. Liquid assets refer to cash or cash-convertible assets, such as bonds or monies held in a trust fund. Fixed assets include property, equipment and household effects. Each province and territory has a complex set of rules defining the maximum amounts of liquid and fixed assets that applicants can retain and still qualify for social assistance. Under rules known as ‘liquid asset exemption guidelines,’ households with cash or cash-convertible assets are expected to use them for personal support [Loewen 1998; Torjman 1998].

These rules have taken on new meaning in light of the considerable attention in recent years on the creation of assets as one component of a broader poverty reduction strategy. There is growing evidence that assets make a real difference to well-being, given the positive correlation between assets and increases to income over the long term [Robson and Nares 2006].

Assets also afford a sense of psychological security not experienced by most Canadians living in poverty.

A variety of asset-based instruments has emerged in recent years to help tackle poverty. Individual development accounts enable private savings for education, training, business development or home ownership. Registered Education Savings Plans encourage savings for post-secondary education. The Canada Learning Bond is intended to enable lower-income households to put aside funds for this purpose. The Registered Disability Savings Plan provides tax-assisted savings to help families with a member with a severe disability create a pool of capital to which the individual would have access after the death of supporting relatives.

These new measures have given rise to a policy challenge. Because they are considered assets within the context of social assistance, special provision must be made to exempt them from the calculation of income. Otherwise, households would be no better off financially than if these measures were not in place. A benefit derived from a federal initiative such as the RDSP potentially could be lost if provinces and territories decided to offset the benefits they pay by the amount of that measure.

In this case, community groups have been involved in policy work that makes the case for exempting the value of asset-based measures. Groups such as Social and Enterprise Development Innovations (SEDI), SEED Winnipeg and the Planned Lifetime Advocacy Network (PLAN) have engaged with provincial and territorial governments in an effort to protect the full value of newly introduced assets intended for low-income households.

PLAN has succeeded, for example, in convincing Newfoundland and Labrador, Ontario, Manitoba, Saskatchewan, Alberta, BC and Yukon to fully exempt the value of and income generated through the Registered Disability Savings Plan. Quebec has agreed to exempt the RDSP as an asset and partially exempt the income derived from the Plan. Decisions on this issue are pending in New Brunswick, Nova Scotia, Prince Edward Island, Northwest Territories and Nunavut.

In addition to assets, there are rules with respect to earning. Welfare recipients are permitted to earn a certain amount of income per month before they start losing part of their welfare benefits. This designated sum is set out in rules known as ‘earnings exemption guidelines.’

Typically, these exemptions are so low that they barely cover additional work-related costs, such as child care, clothing and transportation. Unfortunately, these guidelines have the effect of penalizing work efforts with little recognition of how difficult it is to get started or re-engaged in the labour market. There has been some moderation in the stringency of these exemptions over the years – though welfare recipients claim that these rules still represent a significant disincentive to work. Community initiatives concerned with training and employment have tried to make the case for more generous earnings exemptions in order to create an incentive to work.

Other examples of policy efforts involve the identification of the various ways in which the programs intended to assist low-income individuals and families can actually create problems for these households. For example, a slight increase in earnings – generally considered a good thing – may result in eviction from rent-g geared-to-income affordable housing, which represents a real setback for a family just getting on its feet.

Several reports have illustrated how program rules can create a ‘Catch-22’ for many households, making it virtually impossible for them to improve their life circumstances. Interviews with welfare recipients and others living in poverty provided the foundation for *Why Is It So Tough To Get Ahead?* [Stapleton 2008]. Focus groups and personal interviews also comprised the evidence base for *Survival-of-the-Fittest Employment Policy* [Torjman 2000b].

Other examples of policy work involve efforts to ensure that programs are better integrated and are not working at cross-purposes. The Canadian Working Group on HIV and Rehabilitation has undertaken a project called *Navigating the Maze* to identify how lack of coordination among disability income, employment and other supports actually creates barriers to self-sufficiency. The Working Group has called for improved collaboration within the same level of government and between different orders of government to enable the effective integration of various programs.

The Canadian Working Group on HIV and Rehabilitation has also conducted research on the eligibility criteria and provisions of current disability income programs. They have highlighted the major weakness of the entire system – the fact that current programs do not provide partial income support for persons with episodic disabilities who can participate intermittently or regularly on a part-time basis. Episodic disabilities include HIV/AIDS, lupus, multiple sclerosis, certain forms of cancers, mental illness and arthritis. This (only partial) list makes clear that existing programs exclude hundreds of thousands of Canadians with disabilities.

Some people living with episodic disabilities may be able and want to work part-time or during periods of good health, but remain on full disability benefits because there is no mechanism for partial disability benefits. If persons with these conditions do try to engage in or re-enter in the labour market, they risk losing the security of a full-time benefit and any associated supports, such as technical aids and equipment or personal care services at home. The programs intended to assist these individuals virtually trap them in poverty by creating barriers to staying on the job or returning to work [Stapleton and Tweddle 2008].

10. Monitoring Progress

A veritable explosion of research is under way throughout the country, and indeed the world, on assessing the impact of various policies and monitoring progress related to the quality of life. There are scores of initiatives developing various types of indicators, ranging from national government work in the form of 15 Headline Sustainability Indicators in the UK to local community work, such as Sustainable Seattle in the US. There are even reports that attempt to

capture the range and scope of available indicators to determine the respective strengths and limitations of the various measures currently in use.

For the purposes of this discussion, one example has been selected to illustrate the kinds of monitoring work being undertaken in communities across the country. While this local reporting system is unique to BC Capital Region, the Quality of Life CHALLENGE has developed its methodology to be consistent with the Quality of Life Monitoring System formulated by the Federation of Canadian Municipalities. Building on an accepted national approach enables the community to compare its progress not only against its own targets but also relative to other municipalities engaged in a similar process.

The review efforts in BC Capital Region have been selected for several reasons. First, the work in that community links to a broader national effort, which enables the production of benchmarks and comparisons with other communities. Second, BC Capital Region has been involved in tracking progress over time, which allows the production of benchmarks and comparisons relative to themselves.

The Quality of Life CHALLENGE in BC Capital Region is concerned with a wide range of factors related to the quality of life including poverty reduction, decent employment, affordable housing and active engagement of citizens. In 1999, the initiative published the first Quality of Life Indicators report, which provided baseline information on key indicators in six domains – population, community affordability, housing, workforce, health and community safety, and participation.

The second report, issued in 2005, charted changes over the intervening period and included additional indicators to expand the scope of reporting. For example, it tracked selected indicators of participation such as charitable giving, voting, attendance at festivals, recycling practices, use of a recreation centre and leisure time physical activity.

In the area of housing, six key dimensions were monitored: housing tenure, rental vacancy rate, owner and renter affordability, dwelling condition, core housing need and social housing. The community then assesses the range of information that it collects and explores precisely what it means. This ongoing review creates a foundation for revising the knowledge base and monitoring progress toward achieving the community's desired goal – more affordable housing. The initiative may decide, on the basis of the figures, to step up its activity in some areas and conversely to pull back from others.

There are other significant examples of communities monitoring the social well-being of the community. Vital Signs is an annual report card on the health of a city. It is a yearly check-up that measures the vitality of the community, identifies significant trends and assigns grades in core areas deemed critical to the quality of life. Community foundations in Toronto, Ottawa, Montreal, Vancouver, Victoria, Calgary, Red Deer, Medicine Hat and Waterloo Region are involved in this pan-Canadian effort.

Each of the participating communities is engaged in selecting indicators that help capture its unique assets and concerns. But every year, there will be a set of common issues and core indicators that all foundations are expected to include in their reports and upon which the Community Foundations of Canada will base its national report. Vital Signs identifies a set of core indicators in such areas as learning, work, health and wellness, and crime rates.

Monitoring progress against identified objectives is important for several reasons. Clearly, all communities are interested in knowing whether they are achieving their stated goals – or at least moving in the right direction. But the ongoing monitoring also helps identify areas in which policy work might be required. The housing affordability indicators emerging from the Quality of Life CHALLENGE, for example, led the group to consider a policy intervention to address the affordable housing issue.

Finally, the information gathered through monitoring changes in respect of certain variables feeds back into the beginning of the process. Updated information should be incorporated into a revised evidence base so that this case for intervention actually becomes a work in progress – a continuing story that ideally has many happy endings.

The Enabling Environment

It may be fairly easy to set out the various roles in which communities potentially can become involved in policy. But it is certainly no easy task to undertake this work.

For one thing, the stakes are high. The results of a given effort can be very positive and result in changes that affect substantial numbers of people – even beyond the borders of a given community. For example, having worked successfully on the Guaranteed Income Supplement project with Waterloo Region, the federal government and other communities can apply this successful model more broadly.

At the same time, the results can be negative and entirely unpredictable. Extensive work had been carried out, for example, to convince the federal government to proceed with a shared-cost arrangement with the provinces and territories around a significant investment in disability supports [Torjman 2000a]. The proposal was set to be taken to the relevant federal-provincial/territorial table when 9/11 struck in September 2001 and changed the world forever.

Needless to say, the proposal and virtually every other policy issue on the table died that day and for many years to come. Thankfully, most examples of deferred policy proposals are not that extreme. But the message nonetheless applies: The relevant political and economic context can change rapidly and even unpredictably. The best-laid plans can be scuttled without warning.

Second, it is difficult to find financial support for policy work. Most funders – including all orders of government, community funders and private funders – prefer to support direct pro-

jects in communities where they can see the results of their investment. Another problem is that funding tends to be directed toward short-term interventions while policy interventions often involve a long-term time frame. Fundamental changes are required in the broader policy and funding context in order to sustain comprehensive local work over the longer term and to ensure that the voluntary sector can continue to play the leading role that it effectively has assumed.

While the collection and analysis of poverty data are crucial for developing strategic community approaches, relevant statistical data that aid in this type of neighbourhood-based targeting are often difficult to obtain at the local level. National data generally are not easily disaggregated, making it difficult for communities to paint their own profile. Statistics Canada currently charges a substantial sum for unpublished data, which makes this information inaccessible to most community organizations. Governments can help by providing the required figures or the technical assistance to enable communities to interpret the data.

Learning is another area that usually does not emerge spontaneously in communities. It is a process that must be carefully developed and strategically pursued. The challenge for communities is to identify their learning priorities from among a wide range of possible options. The equally pressing challenge for governments is to figure out how best to support and enhance these choices.

Governments can play an important role in supporting cross-community learning. In addition to assisting communities learn from each other around their policy work, governments can take action internally to improve the policy context. They can examine their programs and services in order to enhance coordination within their own jurisdiction and with colleagues in other levels of government. They can meet with individuals and groups affected by the policies for which they are responsible to assess the impact and the ways in which they may be able to make change.

A group of public servants known informally as the ‘federal family’ invites speakers from across the country to make presentations to federal officials on various comprehensive community projects. The federal family grew out of the policy dialogue that had been set up as part of Vibrant Communities [Torjman 2005a]. A small group of interested officials then worked to ensure that the conversations about community lessons would continue.

In short, governments can play several key roles to enable community engagement in policy. They can provide direct support for this work or indirect support in the form of data collection and interpretation, technical assistance and cross-community learning. But governments can also look for ways to improve current measures and keep their ear to the ground to identify potential problems. Ideally, governments will engage in ongoing dialogue with community groups to create positive working relationships and opportunities for constructive and collaborative work on policy.

Finally, it is important to acknowledge that it typically is not easy for people living in poverty to participate in an authentic way in collaborative efforts. The venues in which meetings are held, the language that may be employed and the activities being undertaken by the group (e.g., developing a strategic plan) may be foreign to people who usually are excluded from these processes. All collaborative initiatives must make a conscious effort to ensure that they themselves create appropriate and inclusive environments that enable genuine participation by all community members.

Endnotes

1. In addition to the dramatic rise in the concentration and incidence of low income, *Poverty by Postal Code* pointed to the growth in high-poverty neighbourhoods, which have almost doubled every ten years since 1981. The number rose from 30 high-poverty neighbourhoods in that year to 66 in 1991 and 120 by 2001. In 1981, there were four very high-poverty neighbourhoods. The figure more than doubled to nine in 1991 and then jumped to 23 by 2001 – nearly six times their number in 1981.

This type of place-based analysis enabled the identification of the precise neighbourhoods that voluntary organizations – in this case the United Way of Greater Toronto – can target for specific interventions. The latter include youth engagement, literacy training, affordable housing and social infrastructure, such as community health centres.

The study was followed by the report of the Strong Neighbourhoods Task Force, which underpins the work of the Action for Neighbourhood Change sites in Toronto. Action for Neighbourhood Change is a renewal initiative under way in the 13 neighbourhoods in Toronto with the highest rates of poverty.

2. Assured Income for the Severely Handicapped was introduced in Alberta in 1979. The program originally was considered an innovative alternative to welfare, and was intended to ensure a measure of dignity and financial support for people with severe disabilities who are unable to work.

But there were a number of problems with the program. Benefit levels had not been increased since 1999. Before the review, the maximum monthly benefit available from AISH stood at \$850. Over the past 10 years, base benefits had climbed by only five percent while the cost of living had gone up 25 percent. Recipients who were able to work could earn only \$200 a month before their AISH benefits were reduced significantly – for every dollar earned over \$200, they could keep only 25 cents.

3. Vibrant Communities Calgary defines living wage as the amount of income an individual or family requires to meet their basic needs, to maintain a decent standard of living and to save for future needs and goals. VCC used Statistics Canada's 2001 before-tax low income cut-off (LICO), adjusted for inflation, as the basis for Living Wage calculations in 2006. They determined that an individual working full time – 35 hours per week, 52 weeks a year – needs to make a minimum \$12 per hour plus benefits to earn a Living Wage.

4. For more information on the Social Finance Forum, go to: www.marsdd.com/socialfinanceforum

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