The United Way/Centraide Ottawa: Tackling Social Exclusion on the Ground

By,

Katherine Solc, B.A. Hon., University of Guelph

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Abstract

This thesis begins with the critical observation that despite the nonprofit sector's prominence in social welfare service delivery and funding, welfare regime studies continue to ignore their importance. There is an urgent need to rectify this lack of attention because multiscalar welfare state reform in recent years has resulted in an increase in responsibilities falling to the local scale of action, in which the nonprofit sector has become an integral player in tackling issues of social exclusion.

This thesis investigates the roles of one particular component of the nonprofit community sector at the local scale. This is done by looking at the United Way/Centraide Ottawa and identifying how this organization's roles in tackling social exclusion have shifted in response to multiscalar welfare state reform. The thesis concludes that the United Way/Centraide Ottawa is a nonprofit organization that plays a significant role in the social welfare community of Ottawa.

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INTRODUCTION

Mainstream comparative social welfare studies tend to traditionally focus on the “tripolar understanding of ‘states, markets, and families” (Graefe, 2004, p.2). According to such models, such as that proposed by Esping-Andersen (1990), the Canadian social welfare regime has most often been classified as ‘liberal’ in nature, implying that the market and family “retain a key role”, with state intervention being modest, heavily means-tested and residual in nature (Mahon, 2008, p.342). While the roles and shape of the state’s participation in social welfare provision are integral to any understanding the Canadian social welfare system, such studies are problematic as they tend to focus on the national welfare state’s contributions alone and to ignore the roles of alternative sites of social welfare provision at the local level, in particular, the local nonprofit sector. Despite the local nonprofit sector’s prominence in social welfare service delivery and funding, however, this thesis argues that welfare regime studies continue to ignore the importance of this alternative site of social welfare, as there continues to be “surprisingly little information available about the sector and the role that it plays in Canada” (Scott, 2003(a), p.166).

While nonprofit organizations in Canada have, in both the past and present, played important roles in responding to community needs, the past two decades of Canadian welfare state rescaling have seen the sector taking an increasingly central role in “the funding and/or delivery of many social programs” (Lightman, 2003, p.223). As social policy has changed, the multiscalar Canadian social welfare state has increasingly looked “to the third sector...to play a leading role” in the provision of social welfare supports (Graefe, 2004, p.2). Further, as “the state removes itself from providing a social

safety net, others are called upon to assist with legitimating this process of disengagement and to provide residual services” (Curtis, n.d., p.15). In addition, as economic hardship has infiltrated the Canadian landscape, particularly following the recent economic recession, and levels of insecurity and social exclusion have increased, the vital role of the nonprofit sector has become more apparent (Social Planning Network of Ontario [SPNO], 2009).

Although nonprofit organizations are “critical but often invisible players” in dealing with social exclusion in the Canadian social welfare system (Curtis, n.d., p.2), not enough is known about the roles played by local nonprofit organizations within the communities they operate. This thesis argues that the omission of such an understanding creates a lacuna of knowledge about the reality of the Canadian social welfare system. This thesis seeks to address this lacuna by looking at a particular local nonprofit public foundation, the United Way/Centraide Ottawa, and identifying its roles, challenges and opportunities for growth, in tackling social exclusion within the community of Ottawa.

What this thesis aims to show is that the United Way/Centraide Ottawa is playing an integral role in Ottawa’s social welfare diamond. Through effective fundraising, focused investments in socially excluded communities, multiscalar relationships with other sectors of the welfare state diamond, and community awareness building, the United Way/Centraide Ottawa has successfully become an organization that is focused on addressing the root causes of social exclusion, and making a considerable impact in this regard. While there is room for improvement, the organization’s reforms constitute a step in the right direction towards successfully tackling issues of social exclusion in the community of Ottawa. An increased awareness of the roles played by the United

Way/Centraide Ottawa, as a nonprofit organization that works to tackle social exclusion, therefore, is important to understanding the social welfare diamond within the community of Ottawa.

Structure of the Thesis

This thesis is structured as follows. Chapter one will provide a theoretical and literature review, highlighting the omission of the nonprofit sector from the dominant social welfare theories. In order to understand the roles of a local nonprofit public foundation, this chapter will then (a) introduce a discussion of the community nonprofit sector into the analysis of the social welfare system, (b) introduce a scalar analysis of the Canadian welfare system, within which the local nonprofit sector must operate, and (c) develop the concept of social exclusion. Chapter two will discuss the past and present relationships and spaces of action for the nonprofit sector within the Canadian multiscale social welfare diamond. This chapter will show how the period of welfare state reform and rescaling affected the relationship between the Canadian 'state' and the nonprofit sector, shifting from covert acknowledgement to overt partnership and 'networking'. Such shifts have also affected the nonprofit sector's ability to fulfill its new roles, as increased responsibilities have not been met with adequate levels of support or recognition, leaving the nonprofit sector in a tumultuous environment. Chapters three and four will then focus on the concept of social exclusion. Chapter three will address the social welfare state's role in contributing to the process of social exclusion, both as a matter of welfare state rescaling, and as a matter of social welfare design, and will provide an understanding as to why certain populations are more often excluded than

others. Chapter four will then address social exclusion in Ottawa by identifying the socially excluded populations within this community. Chapter five will focus on the case study at hand, outlining the contributions of the United Way/Centraide Ottawa in tackling social exclusion in Ottawa, and the way these contributions have changed over time. This discussion will include not only an overview of the structure and mandate of the United Way/Centraide Ottawa, but also an in-depth analysis of the organization's primary roles and challenges in tackling social exclusion in Ottawa. Chapter six will then provide a summary and some concluding thoughts.

CHAPTER 1 – Theoretical Background

1.1 Introduction

To understand United Way/Centraide Ottawa's role in tackling social exclusion, the broader role played by nonprofit organizations in the Canadian social welfare regime needs to be understood. This chapter will begin with the concepts of citizenship and the welfare state, which lay the foundations for the introduction of Esping-Andersen's (1990) concept of 'welfare state regimes'. Esping-Andersen's (1990) theory, however, is not without its criticisms. This paper will focus on three. First, Esping-Andersen's (1990) welfare state regime theory needs to be expanded beyond the triad of state, market and family. Using the concept of the welfare state 'diamond' (Abrahamson, Boje & Greve, 2005; Jenson & Saint-Martin, 2003), I will include the important component of the nonprofit/community sector. Second, to understand the sociopolitical environment within which local nonprofit organizations must function, I will introduce the idea of Canada as a multiscalar state. In some respects this is not a new idea as many scholars (Boychuck, 1995; Boychuck, 1998; Bureau & Kroger, 2004; Graefe, 2006(a); Hall & Banting, 2000; Pal, 1987; Peck, 2002; Sellers & Lindstrom, 2007; Tester, 1996; Tremblay, Aubry, Jette & Vaillancourt, 2002) recognize the importance of federalism and the multiscalar state to the development and structure of Canada's welfare state regime. Nevertheless, there is a tendency to ignore the local scale (municipalities and cities), despite its longstanding importance, especially, but not exclusively, in the province of Ontario. Since many nonprofit organizations operate at the local scale, it is important to understand what the local scale is composed of, and how it is shaped. Third, while Esping-Andersen's (1990) concept of stratification introduces the way that welfare states

can establish class distinctions amongst their citizens, it fails to recognize the way welfare states may contribute to stratification and social exclusion on the basis of other forms of division. It is important to comprehend all of the multidimensional elements involved in the production of social exclusion in order to best understand those most in need of nonprofit services and programs, as well as to understand the best responses to their social exclusion. These three elements can thus be used to supplement Esping-Andersen's (1990) concept of welfare state regimes, providing an appropriate theoretical framework for assessing the contributions made by the United Way/Centraide Ottawa in the social welfare community.

1.2 The Foundation of the Welfare State: Social Citizenship

Social welfare can be simply defined as the method by which “people, communities and institutions in a society take action to provide certain minimum standards and certain opportunities” (Hick, 1998, Module 1, Topic 3). There are, however, important facets of social welfare which must be considered beyond such a definition, including: who is granted social welfare supports? Who is responsible for administering social welfare? To answer these questions, we must first look to what is often viewed as the foundation of social welfare; social citizenship, as well as explore what the ‘welfare state’ is, as the primary provider of social welfare programs and services.

T.H. Marshall (2007) considered social welfare to have originated with the development of social citizenship and social rights. Marshall saw citizenship as a:

“status bestowed on those who are full members of a community. All who possess the status are equal with respect to the rights and duties

with which the status is endowed. There is no universal principle that determines what those duties shall be, but societies in which citizenship is a developing institution create an image of an ideal citizenship against which achievement can be measured and towards which aspiration can be directed” (Marshall, 2007, p.34).

Marshall (2007) believed that citizenship was comprised of three elements; civil, political, and social citizenship. To Marshall, the civil element “is composed of the rights necessary for individual freedom – liberty of the person, freedom of speech, thought and faith, the right to own property and to conclude valid contracts, and the right to justice” (Marshall, 2007, p.30). Political citizenship reflects the “right to participate in the exercise of political power, as a member of a body invested with political authority or as an elector of the members of such a body” (Marshall, 2007, p.30). Most important for the purposes at hand, however, was Marshall’s introduction of a social element of citizenship, and with it, the welfare state. According to Marshall, social citizenship was introduced to minimize class differentials, modify patterns of social inequality, and reduce risk and insecurity in a civilized state (Marshall, 2007). The rights associated with the introduction of social citizenship (social rights), were meant to reflect a range of rights, from “the right to a modicum of economic welfare and security to the right to share to the full in the social heritage and to live the life of a civilized being according to the standards prevailing in the society” (Marshall, 2007, p.30). These social elements to citizenship were intended to be closely administered by the systems of education and social services of the welfare state (Marshall, 2007, p.30).

Simply put, the welfare state is “a system whereby the state undertakes to ostensibly protect the health and wellbeing of its citizens, especially those in financial need” (Hick, 1998, Module 1, Topic 20). It does so by deliberately modifying market

forces, on the basis of equality and social citizenship, in order to assist those in poverty or distress (Briggs, 2007; Marshall, 2007). In other words, a welfare state is;

“a state in which organized power is deliberately used (through politics and administration) in an effort to modify the play of market forces in at least three directs – first, by guaranteeing individuals and families a minimum income irrespective of the market value of their work or their property; second, by narrowing the extent of insecurity by enabling individuals and families to meet certain ‘social contingencies’ (for example, sickness, old age and unemployment) which lead otherwise to individual and family crises; and third, by ensuring that all citizens without distinction of status or class are offered the best standards available in relation to a certain agreed range of social services” (Briggs, 2007, p.16).

Marshall’s view on social welfare, however, was fairly ‘narrow’ in scope, for it did not take into account the varieties of welfare state composition and function, both historically and in the present. For example, Marshall (2007) saw social citizenship and the development of the social welfare state as ‘national’ by definition, which meant the centralization of responsibility at the national scale. By looking only to the national welfare state’s role in the provision of social welfare, however, Marshall (2007) ignored the roles played by local or subnational social welfare institutions. Second, in Marshall’s conception, social rights were envisioned with the intention to minimize class differentials. By framing citizenship in terms of social class alone, however, Marshall dismissed other demographic groups and their experiences of citizenship, social rights and welfare state supports. Further, Marshall’s view (2007) only looked to the “traditional terrain of social amelioration” such as income transfers and social services (Esping-Andersen, 1990, p.1). By acknowledging such gaps, in part, Gosta Esping-Andersen’s (1990) welfare state regime theory proves to be more beneficial in addressing the dynamics of the welfare state.

1.3 Gosta-Esping Andersen's Welfare State Regime Theory

Gosta Esping-Andersen (1990) pursued a comparative approach to social welfare studies. His work enriched theories of the welfare state in two ways. First, by looking to what he saw as the 'salient characters' of welfare states, Esping-Andersen (1990) ventured beyond the state's interventions in social welfare and introduced an understanding of the other systems of social welfare provision, the market and the family, referring to what he called the 'welfare mix'. By comparing countries according to their public-private provision of welfare, he then grouped them into a three-fold classification of welfare regimes (Scruggs & Allen, 2006). Second, while Esping-Andersen (1990) agreed with Marshall that the development of the welfare state was founded on social citizenship, he also believed that the concept required more fleshing out, to include an understanding of the types of social citizenship offered and the manner in which it was provided to citizens, that is, through measures of de-commodification and stratification.

De-commodification was designed to determine the quality of social rights granted in a social welfare state, in terms of the "degree to which they permit people to make their living standards independent of pure market forces" (Esping-Andersen, 1990, p.3). Social rights, therefore, were "gauged according to the accessibility of benefits, their generosity and duration, and the range of entitlements" (Morissens & Sainsbury, 2005, p.639). If a welfare state granted equal, well-supported and universal social welfare services on the basis of social citizenship, such social rights and services entailed "a de-commodification of the status of individuals *vis-à-vis* the market", by which individuals would not have to rely on the market to secure social welfare supports (Esping-Andersen, 1990, p.21). Alternatively, if social welfare supports depended upon

an individual's participation in the labour-market, such state-provided social rights and services were considered 'commodifying'.

Despite the common assumption that the existence of a welfare state is meant to create a more egalitarian society, Esping-Andersen also acknowledged that the welfare state is "...in its own right, a system of stratification" (Esping-Andersen, 1990, p.23). Esping-Andersen (1990) recognized the ability of social welfare states to stratify societies in terms of class, and to play out this embedded stratification in practices of unequal social citizenship and social rights. He did so by outlining how selective social policies, such as means-tested social-assistance and social-insurance models, have the ability to divide individuals into different groups. Alternatively, Esping-Andersen (1990) found that social policies based on universalism promoted equal social citizenship, regardless of one's social class. Even within universalistic models, however, Esping-Andersen (1990) found that stratification could continue to exist, for a universalistic welfare state may be dualistic in form if the poor are meant to rely on basic universal welfare state supports and the better-off turn to private market-based supports at a cost.

Esping-Andersen (1990) categorized each welfare state's structure with respect to its 'welfare mix' (respective roles of the state, markets and families), and levels of de-commodification and stratification. In doing so, Esping-Andersen (1990) distinguished between "three highly diverse regime-types", known as the 'liberal', 'conservative', and 'social-democratic' welfare state regimes (p.3).

Broadly stated, Canada's national social welfare state falls into the 'liberal' welfare state regime, distinguished by its preference for market and familial solutions to social welfare problems that are supplemented by modest state supports (Esping-

Andersen, 1990; Mahon, 2008; Scruggs & Allan, 2006). State interventions in this regime are also often heavily means-tested, containing strict entitlement and access rules (Esping-Andersen, 1990). As a result, ‘liberal’ welfare states, such as Canada, offer lower levels of de-commodification, limited social rights, and relatively high levels of stratification (Esping-Andersen, 1990). While some authors prefer an understanding of the ‘liberal’ welfare state regime that allows for a variety of ‘liberal’ program designs (Kasza, 2002; Mahon, 2008; Myles, 1998; White, 2005), when looked at comparatively to Esping-Andersen’s other welfare state regimes, Canada does broadly fall within this ‘liberal’ regime cluster at the national level.

Esping-Andersen was the first to suggest that “the welfare state is about more than just services and transfers” (Pierson & Castles, 2007, p.154). Instead, he looked to understand the “larger institutional complex in which this social spending takes place” (Myles, 1998), and to look at the quality and types of services provided. Beyond solely understanding the welfare state’s role, he incorporated an understanding of the additional actors involved in providing social welfare (market and family). Further, he acknowledged the active nature of the state in defining the boundaries of social inclusion via citizenship definitions and stratifying social policy. Nevertheless, there are three overarching problems with Esping-Andersen’s welfare state regime theory. First, and most important for this thesis, Esping-Andersen’s classification omits a vital element of social welfare delivery – the role of the community (Abrahamson, Boje & Greve, 2005; Graefe, 2004; Graefe, 2006(a); Jenson & Saint-Martin 2003; Wood and Gough 2006; Yeates, 2008). While community organizations, such as nonprofits, have long been involved in social service delivery, there is a need to recognize the ongoing role played

by such informal non-state actors in the broader ‘welfare mix’. By incorporating the community into the discussion, Esping-Andersen’s welfare mix shifts from a welfare triangle (states, markets and families) to a ‘welfare diamond’ (states, markets, families and communities). By recognizing the existence of this “extended welfare mix” we are able to acknowledge the contributions of non-state and community actors to social welfare programs (Yeates, 2008, p.16).

Second, Esping-Andersen’s model focuses primarily on the national level of state government, much like Marshall (2007) did. Although social welfare state regimes may be structured within national state-boundaries, such a focus is problematic, for it does not allow one to understand the multiscale levels of interaction, in particular, the roles played by subnational states in social welfare service delivery. Further, a focus on the national state alone dismisses the multitude of actors involved in social welfare at various scales of action, including the community sector. In this thesis, to understand the role of the United Way/Centraide Ottawa, it is therefore important to understand that the components of the ‘welfare state diamond’ operate at various scales and interact with one another to shape the administration and provision of social welfare (Burau & Kroger, 2004).

Lastly, while Esping-Andersen (1990) acknowledged that welfare regimes can be exclusive in terms of their ability to stratify social citizenship, he did so only in terms of class relations. This is problematic, for in reality there are multiple kinds of stratification. To understand the populations that nonprofit organizations service at a local scale, one must understand that there are many patterns of inequality and social exclusion which

create gaps in social welfare coverage, thereby creating spaces for the community sector to act within, especially at the local level.

In conclusion, for the purposes of this paper, Esping-Andersen's 'regime' framework must be adjusted to allow for: i) the incorporation of the community sector to Esping-Andersen's welfare mix; ii) a recognition of the multiple scales of action; and iii) an understanding of the factors which stratify citizens in ways other than those related to class.

1.4 Theoretical Framework: The Multiscalar Welfare Diamond

1.4.1 The Community Sector of the Canadian 'liberal' social welfare regime

As argued above, Esping-Andersen's theory must be expanded to include the community sector as an alternative space of social welfare provision beyond that of the market, state and family. Various terms are used to characterize this component of the Canadian social welfare diamond, but the one to be used here is the nonprofit sector. This paper is also only concerned with the nonprofit sector that deals with issues of social welfare. For the purposes of this thesis, therefore, the nonprofit sector includes those organizations which contain most, if not all, of the following organizational elements:

- potentially of charitable status¹;
- nonprofit seeking in motive and purpose;
- centered around the provision of social welfare services and serve a public purpose;

¹ In Canada a distinction is made between nonprofit organizations and charities. The Canada Revenue Agency (CRA) states that a nonprofit organization is "an association, club, or society that is operated exclusively for social welfare, civic improvement, pleasure, recreation or any other purpose except profit. It is not a charity" (CRA, 2010). Alternatively, a registered charity is "a charitable organization, public foundation, or private foundation that was established in Canada...and is operated for charitable purposes and must devote its resources to charitable activities" (Canada Revenue Agency [CRA], 2010). Such definitions, however, are contrary to a number of theoretical definitions for the nonprofit sector in Canada, as many nonprofit organizations may be considered charitable, or vice versa.

- take a variety of organizational forms, including, but not limited to, voluntary organizations, charities and foundations;
- independent of the government;
- self-governed;
- often rely on substantial voluntary participation; and
- activities may concentrate on specific service areas or populations, however some are spread across the community;
- rely on mixed forms of income including fundraising, public/private donations, and some are more dependent on government funding such as grants and contracts;

Nonprofit organizations also exhibit a number of distinctive characteristics and value-orientations which set them apart from the for-profit or state sectors. For the purposes of this thesis I am concerned with nonprofit organizations that are

- directed towards goals of general social amelioration and moral principles of trust, mutuality and common cause;
- focused on the wellbeing of the whole of society although activities may concentrate on specific service areas or groups/populations; and
- may provide a voice by which to advocate for those who need help for a variety of causes;

To investigate the roles of the United Way/Centraide Ottawa, one specific subdivision of the nonprofit sector in Canada, the public foundation, is also of particular interest. As opposed to nonprofit organizations, a public foundation is defined as an organization that “generally gives more than 50% of its income annually to other qualified donees, usually other registered charities...[and] generally receives its funding from a variety of arm’s length sources” (CRA, 2010). Different from nonprofit organizations, public foundations generally focus on raising funds to support other agencies or charities rather than carrying out charitable activities themselves (CRA, 2006). Such foundations work to “pool revenues and assets donated from a variety of

sources and target action at community or neighbourhood level in a specific geographical region” (De Borms, 2005, p.47).

Although there were over 161,000 nonprofit, voluntary and charitably registered organizations and foundations in Canada in 2003 (Hall et al., 2005), there remain “huge uncertainties and gaps in our current knowledge of the nonprofit sector” (Dreessen, 2000, p.25). While organizations in the nonprofit sector vary immensely in structure, dependent on their economic, societal, cultural and political features, many fulfill a role in the Canadian social welfare sector (Hall & Banting, 2000). While many such organizations identify needs not being met by state social policy initiatives and provide services to socially excluded populations, others are sought after by the welfare state, to deliver programs on its behalf. There is a need, therefore, to further understand the functions of nonprofit organizations in the Canadian social welfare system, as both independent and collaborative agents of social welfare provision.

1.4.2 The Canadian Multiscalar Welfare State:

To explore the role of the United Way/Centraide Ottawa, one must understand what the local socio-political environment looks like. Although much of the traditional social welfare literature focuses on the national state, in Canada social policy and its administration is both a multiscalar and multi-institutional process. To understand what this local level is composed of, therefore, scalar theory makes an important contribution, for it offers

“a way to escape the limits of methodological nationalism without throwing the baby out with the bathwater. It recognizes that what is involved is a complex, contested process of reconfiguring interscalar arrangements, in which the national scale retains a certain importance,

albeit in different ways than during the twentieth-century heyday”
(Mahon, 2006, p.453).

Scalar theory, therefore, reminds us that the local scale of action, while independent, is embedded within the broader national scale, and that shifts and changes in one scale of action may have a significant impact upon other scales of action (Fenger & Henman, 2006; Graefe, 2006(a); Jessop, 1999; Laforest, 2005; Mahon, 2006; Peck, 2002; Swyngedouw, 1996; Swyngedouw, 1997). Scalar analysis further suggests that there are a “variety of ways in which welfare-related activities are coordinated”, allowing us to introduce non-state actors to the multiscalar analysis (Bureau & Kroger, 2004, p.794).

In terms of the multiscalar Canadian welfare state, the primary role for social welfare administration lies within the jurisdiction of the provincial governments, with the federal government effectively functioning as ‘banker’ to the provinces (Ismael, 1988; Mahon, 2009). Given the minimal levels of restriction on the provinces, each is able to set its own priorities, resulting in a variety of ‘liberal’ welfare provincial states (Boychuk, 1995). To understand the functions of a local nonprofit organization, however, there are “progressive gains to be made by shifting the focus from the provincial to the local scale” (Jenson & Mahon, 2002, p.13). The local scale, which is comprised of, among other things, local and municipal governments, is increasingly delivering a greater number of social services to the community. As will be discussed in chapter two, recent trends of rescaling to local governments have resulted in the local scale being increasingly important to the delivery of social services (Lightman, 2003; Sellers & Lindstrom, 2007). These same local governments, however, often find themselves struggling to supply appropriate levels of social service delivery, as a result of insufficient fiscal resources and

tight policy constraints as set by ‘extralocal’ rule regimes (rules, regulations and structures as defined by the upper levels of government) (Peck, 2002).

As has been noted above, however, scalar theory reminds us that the multiscalar state is not the only actor in the Canadian welfare diamond, which allows for additional actors, such as the community sector, to be brought into the equation. While the state may retain the “prime responsibility for social welfare” (Hick, 1998, Module 1, Topic 16), the nonprofit sector continues to play a growing role in the provision of social welfare in the Canadian ‘liberal’ social welfare diamond (Lightman, 2003). Such community sector and nonprofit organizations work in a number of ways and at multiple scales, interacting closely with, and independent of, the local, provincial and federal states. Independently, these nonprofit organizations can operate as local “small-scale responses to the rigidities of the social service professions and the institutional service sectors” (Mishra, Laws & Harding, 1988, p.120), providing services and programs to those being missed by the multiscalar social welfare state. Nonprofit organizations, however, may also act in a collaborative manner, coordinating horizontally and vertically with the various scales of government. While such nonprofit organizations are increasingly playing an important role, however, they have also faced significant problems of capacity. As the demands placed upon them have increased in the wake of welfare reform, they have also been faced with funding cutbacks from the various scales of state, forcing them to revisit their methods and modes of operation.

To summarize, nonprofit organizations in the Canadian multiscalar social welfare diamond play a tremendously important role. They are increasingly relied upon to service needs not being met by state sector social welfare organizations. To understand

the roles of the United Way/Centraide Ottawa within this rescaled social welfare state environment, I will delve further into the local scale of consideration, the community of Ottawa, in chapter two.

1.4.3 The Social Welfare State and Social Exclusion

To understand United Way/Centraide Ottawa's roles we must also better understand the concept of social exclusion, and how this process results in certain populations needing specific assistance that local nonprofit organizations are able to provide. This requires an examination of the historical patterns of social exclusion beyond those of solely class stratification. While poverty, a more commonly used concept in the study of inequality, is related to issues of resource and income distribution, social exclusion looks to deeper social relational issues, including systemic and societal failures, which result in multiple deprivations for vulnerable and disadvantaged groups. Rather than being independent of poverty, therefore, social exclusion is a "destination on a journey through poverty" (Walker, 1995, p.127 as cited in Badelt, 1999, p.6).

Social exclusion is best understood as a multidimensional process and outcome (Social Planning Council of Ottawa [SPCO], 2008(a)). As a process, social exclusion incorporates the "true economic, political and social aspects of 'distancing', including access to community services and facilities" (SPCO, 2008(a), p.23). As opposed to marginalization, which is the social process of being made marginal and confined to a lower social standing, social exclusion

"...deprives individuals and families, groups and neighbourhoods of the resources required for participation in the social, economic and political activity of society as a whole...is primarily a consequence of poverty and low income, but other factors such as discrimination, low

educational attainment and depleted living environments also underpin it. Through this process people are cut off for a significant period in their lives from institutions and services, social networks and developmental opportunities that the great majority of a society enjoys” (Pierson, 2002, p.7).

There are two conditions that contribute to the process of social exclusion. First, levels of social exclusion are directly linked to social welfare state cutbacks and reform. It is not difficult to understand that as the multiscalar welfare state reduces its supports, more people find themselves excluded from state-provided social services (Gough, Eisenschitz & McCulloch, 2006). This view, however, does not help the reader to understand why particular groups are more likely to be excluded. Second, therefore, one must recognize that the process of social exclusion is also intricately linked to a social welfare state’s institutional structure and systems of stratification (Badelt, 1999). While Marshall’s (2007) conception of national social citizenship was one that saw it as inclusive and equalizing, the reality is that citizenship is not only an inclusive process. Instead, social citizenship can be exclusive. Further, while Esping-Andersen (1990) recognized the excluding ability of social welfare states, he did so only in terms of class stratification. The reality is that social welfare states have the ability to stratify their populations and create social exclusion beyond solely class differentials. They do so through unequal conceptions of citizenship which originate from deeply rooted patterns of inequality that work to “define the limitations of membership in a given political community and to regulate the conditions of inclusion and exclusion” (Bilge, 2004, p.289). Such deeply rooted patterns of inequality, such as those based on gender, race, ethnicity, disability or age, are executed through welfare state policies and work to

stratify citizens, resulting in what O'Connor (1993) calls a "tiered system of access to social rights" (p.504).

The outcome of social exclusion is the socially excluded; "a group of people who are 'non-citizens' who are excluded from exercising the rights enjoyed by other citizens" (Abbott, 2000, p.88). These socially excluded populations are the "groups [who find] themselves on the margins of society, as evidenced by outcomes of lower social and economic status, combined with a lack of power to change these outcomes" (SPCO, 2008(a)). The socially excluded are typically women, children, the aged, the disabled, visible and ethnic minorities, immigrants (especially recent immigrants), and Aboriginal populations (Bhalla & Lapeyre, 1999; Mitchell & Shillington, 2002; Public Health Agency of Canada [PHAC], 2004; SPCO, 2008(a)). As will be seen in chapters three and four, these patterns are replicated at all scales of action.

Social exclusion as an outcome is experienced through multiple dimensions (economic, political, and social), which result in "multiple and overlapping sources of deprivation" (Mitchell & Shillington, 2002, p.7). The economic dimension, which is "concerned with the questions of income and production and access to goods and services from which some people are excluded", is the most often measured, using indicators of unemployment, poverty levels, and/or the satisfaction from basic needs such as housing/shelter, health or education (Bhalla & Lapeyre, 1999, p.18; Pierson, 2002). The social dimension moves beyond economic indicators to include access to social rights; social services, social participation, existence of social networks, and the social characteristics of one's locale which play a role in shaping an individual's rights, opportunities and social engagement (Bhalla & Lapeyre, 1999; Mitchell & Shillington,

2002; Pierson, 2002). Lastly, the political dimension “concerns the denial of certain human and political rights to certain groups of the population” and the opportunity to participate in public decision making, dependent on state interaction with individual citizens (Bhalla & Lapeyre, 1999, p.22; Mitchell & Shillington, 2002).

Analysis of the socially excluded must also be supplemented by an intersectional approach. According to Bedolla (2007), intersectionality is a research paradigm used to “understand and articulate the multiple oppressions that all marginalized groups face” (as cited in Hancock, 2007, p.248). Intersectionality acknowledges that, rather than there being single categories of difference (for example, class, race, ethnicity and gender), these categories are, in reality, overlapping categories of difference, each which must be looked at to better understand complex political and social problems and processes (Hancock, 2007; Yuval-Davis, 2007). By incorporating an intersectional approach to social exclusion, we will be better able to understand the complex interrelationships between the factors of race, gender, and class (as well as others including age and disability) which inform social welfare and social policy (Hancock, 2007; Williams, 1995; Yuval-Davis, 2007).

In applying this approach I have acknowledged the existence of wider social, structural, economic and political factors in the production of social exclusion. As a process of stratification, social exclusion results in the denial of, and unequal access to, social citizenship rights. The socially excluded groups are those who are most often in need of services and programs provided by nonprofit organizations. Apart from the direct provision of goods and services for socially excluded populations, nonprofit organizations also have the ability play a significant role in combating social exclusion,

particularly at the local scale, by acting as “institutional tools to prevent social exclusion or to re-integrate citizens that are already affected by social exclusion” (Badelt, 1999, p.13). This goes beyond simply looking to the individual’s exclusion from supports, but is also concerned with “all subsystems of society” and their impact on creating social exclusion (Badelt, 1999, p.13).

To assess the roles of the United Way/Centraide Ottawa, therefore, we must further explore who the socially excluded communities are in Ottawa, as well as understand why particular populations are socially excluded. In chapter three, therefore, I will investigate the processes that contribute to social exclusion at all scales of Canadian society. In doing so, we will see that social exclusion in Canada not only results from shifting and rescaling social welfare policy, but also from deeply rooted and historically held beliefs and prejudices that result in differential access to social citizenship entitlements at all scales of action. Following this, in chapter four, we will see that these social exclusionary processes have resulted in identifiable populations experiencing extreme levels of social exclusion in Ottawa.

1.5 Conclusion

This chapter has laid the theoretical foundations for analysis of the roles of the nonprofit sector in the Canadian welfare state, including those of public foundations such as United Way/Centraide Ottawa. While Marshall’s (2007) concept of social citizenship and Esping-Andersen’s (1990) theory of welfare state regimes remain widely used, in order to investigate the under-researched role of the nonprofit sector, these theories need to be nuanced. First, this chapter has shown that Esping-Andersen’s theory must be

expanded to acknowledge the nonprofit sector's position within the Canadian 'liberal' welfare diamond. Second, both Marshall (2007) and Esping-Andersen (1990) focus on the national level of social welfare state provision, and underestimate the value of a scalar approach by which to understand Canada's structure as a multiscale welfare state diamond. Rather than being composed of a single 'liberal' nation-state which governs social policy, Canada's welfare state is made up of a multitude of actors operating at various scales of action. Lastly, while Esping-Andersen acknowledges the welfare state's ability to stratify populations based on class, this chapter has argued that deeply rooted patterns of citizenship inequality beyond those of class are embedded within the social welfare state. Such practices contribute to the creation of socially excluded populations in need of social welfare supports that nonprofit organizations may be better equipped to provide.

This chapter has shown that the nonprofit sector has the ability to play a significant role in tackling social exclusion within the Canadian 'liberal' multiscale welfare diamond. Further, this chapter has shown that while the role of the nonprofit sector is under-researched, even less attention is paid to the contribution of public foundations within the social welfare diamond. In an attempt to address this lacuna, the goal of this thesis is to investigate the roles of one component of the nonprofit sector in tackling social exclusion, the United Way/Centraide Ottawa.

The selection of the United Way/Centraide Ottawa as a case study was strategic. Given the breadth of the nonprofit sector, I selected the United Way/Centraide Ottawa because it (a) is organizationally small enough to be able to conduct in-depth and detailed research, and (b) has a long history as a nonprofit public foundation in the community of

Ottawa, including having undergone systematic changes in its approach to social exclusion following periods of welfare state reform.

To assess the United Way/Centraide Ottawa's roles within the local social welfare community of Ottawa, the reader must first gain a greater understanding of the way that spaces have been created for the community component to act within (chapter two); how the Canadian welfare state's social citizenship compositions have contributed to the creation of harsh conditions of social exclusion for many citizens (chapter three); who the socially excluded populations are within the community of Ottawa (chapter four); and finally an analysis and assessment of the roles of the United Way/Centraide Ottawa in tackling social exclusion within the social welfare diamond of Ottawa (chapter five).

By addressing the lacuna in research on nonprofit organization's roles in the Canadian liberal social welfare diamond, I hope to reveal that the United Way/Centraide Ottawa makes a significant impact on social exclusion in Ottawa. While the United Way/Centraide Ottawa functions to fill a certain 'welfare state gap', by funding nonprofit programs and services not provided by the welfare state, I also aim to show that it does much more. The United Way/Centraide Ottawa is a dynamic organization, capable of making a significant and focused impact upon social exclusion within the community of Ottawa.

1.6 Research Methods

The research methods used in this thesis are both quantitative and qualitative. To explore the socio-political histories, and current situations of the Canadian social welfare system, and that of Ottawa in particular, primary and secondary resources are used. Such

resources provide a greater understanding of the theories to be applied, as well as detailed information by which to create a comprehensive contextual analysis of the community and nonprofit sectors roles and responsibilities in both Canada and Ottawa. At times, I draw on non-academic sources for statistical information, due to the lack of information available from academic resources. While I am aware that such data are often produced as supports for NGO advocacy, given the limited research available on nonprofit organizations in the social welfare diamond, particularly in Ottawa, such data is valuable and rich in demographically specific information. This paper in no way, however, intends to reflect the advocacy functions of such organizations.

To understand the functions of the United Way/Centraide Ottawa, the primary and secondary literature research is also supplemented with in-depth personal interviews with staff of the United Way/Centraide Ottawa, as well as members of the Ottawa community familiar with the United Way/Centraide Ottawa. The interviews were conducted between January and February of 2010 at convenient locations to the interview subjects, and follow-up interviews were scheduled when needed. Issues of ethical consideration with respect to the interviews were addressed in a Carleton University Ethics Submission, and approved by the Carleton Ethics Board. A total of 45 individuals were contacted for interviews, and the 30 individuals who agreed to participate were eager to do so, while those who could not participate indicated that it was only due to time constraints. A total of 35 interviews were conducted, including follow-up interviews. Interview subjects encompassed those who have personal knowledge of and experience with the United Way/Centraide Ottawa, including staff and volunteers of the United Way/Centraide Ottawa, staff from agencies funded by the United Way/Centraide Ottawa and those in

academia. It is also important to note that in order to encourage frank dialogue and honest responses, the option for anonymity was granted to each interview participant. While many participants waived their right to anonymity, all of those who participated from agencies funded by the United Way/Centraide Ottawa and those from academia, partook of the opportunity for anonymity, and understandably so, considering the sensitivity of the topic being discussed. Research limitations, such as interviewee bias, must also be considered. While all interview participants were eager to participate and provided their responses with the best intentions, many participants worked for, or directly with, the United Way/Centraide Ottawa. As a result, as a researcher, it was important to remain as impartial and critically reflective of the information provided by interview subjects.

CHAPTER 2 – Canadian Welfare State Rescaling and its effects on the nonprofit sector

2.1 Introduction

To understand the roles of the United Way/Centraide Ottawa, we must explore how changes to the Canadian ‘liberal’ welfare regime over time have affected the environment within which the community component of the welfare diamond must operate. Although the nonprofit sector plays a vital role, as argued in the previous chapter, the relationship between the ‘liberal’ welfare ‘state’ and the ‘community’ component of the welfare state diamond is incredibly complex, varying across space and over time (Phillips, 2003). Further, although Canadian government support of the nonprofit sector has increased dramatically over the last forty years (Smith, 2007), there is no overarching model to understand how welfare state rescaling has affected the community component of ‘liberal’ welfare regimes. For example;

“while intricate and tangled state non-profit sector relations have developed in most European countries, as governments fund the sector to provide personal services, the American non-profit sector stands out in its adoption of commercial activities and strategies and for its reliance on developing relationships with businesses and private donors (including foundations)” (Graefe, 2006(b), p.199).

Scalar theory is helpful here as it reminds us that there is interdependence across scales, such that any analysis of the local scale requires its situation be considered in relation to developments at other scales (Mahon, 2006). Scalar theory also reminds us that welfare state restructuring and redesign involves more than a restructuring of state policies. It also includes interscalar and inter-organizational shifts, which result in the blurring of jurisdictional boundaries for social welfare responsibility amongst the various sectors (Fenger & Henman, 2006).

Following a brief overview of the historical changes to the Canadian ‘liberal’ welfare state, questions to be addressed in this chapter will be: how have such changes influenced the roles of the local nonprofit sector, including their relationship with the various scales of the Canadian welfare state? What are the advantages and challenges to nonprofit/community sector intervention in the area of social welfare?

2.2 Multiscalar Canadian Welfare State Redesign and Rescaling

2.2.1 Pre-War Canadian ‘Welfare’ State

Prior to the 1930’s, Canada had no national welfare state and only a few social welfare programs which were left to provincial and/or municipal governments to administer, resulting in considerable ‘liberal’ variation across the country (Boychuk, 1995). During this time, any state provided social assistance broadly followed the individualistic Elizabethan ‘poor law’ tradition, which perceived assistance an act of charity and distributed it on the basis of ‘indignation’ which categorized the poor into ‘deserving’ and ‘undeserving’ categories (Myles, 1998). For the most part, those in need would therefore seek assistance through community and voluntary organizations. Even as national ‘programs’ began to slowly be introduced throughout the 1940s and 1950s, provincial and local governments, and nonprofit and charitable organizations, remained the primary providers of support.

2.2.2 The Post-War Multiscalar Canadian ‘Liberal’ Welfare State

As described briefly in chapter one, the post-war Canadian welfare state that surfaced following the Second World War, broadly falls into Esping-Andersen’s (1990) ‘liberal’ welfare regime. Some authors, however, such as Myles (1998) and Kasza (2002), support a more nuanced version of Esping-Andersen’s typology, arguing that it leaves us with an incomplete analysis of the differences in countries’ welfare state designs (Kasza, 2002; Myles, 1998; White, 2005). In particular, Myles (1998) indicates that, while there are “broad institutional similarities” (p.343) between the ‘liberal’ welfare states of the United States of America and Canada, they differ “dramatically in programmatic design”, particularly in their post-war structures (p.349). A clear example of this is that, during the postwar period, Canada pursued a fairly universalistic model of social welfare, while the latter never took hold in the United States of America (Myles, 1998). As a result, although “Canadian social policy has been liberal from the outset”, a variety of liberal responses have taken shape in both the past and present design that distinguish it from other ‘liberal’ models (Mahon, 2008, p.345).

During the ‘Golden Age’ of post-war welfare in Canada, as the federal government recognized that the nation-state had a responsibility to provide a minimum level of social security to its citizens, notions of collective responsibility and social liberalism overtook the previously individualistic view of social welfare. This view shifted the criterion for access to social assistance from that of indigence and charity, to that of social citizenship and social rights (Myles, 1998). The resulting Canadian welfare state offered a mixed-model of social welfare coverage which consisted of fairly modest yet universal flat-rate benefits and programs (such as old age benefits, child benefits and

hospital coverage), social assistance, and subsequent low-level public earnings-related social insurance schemes (Myles, 1998, p.350; Mahon, 2008). Many of these programs were funded by federal government transfers to the provinces through the Canada Assistance Plan (CAP) (1966), on a 50/50 basis. In true 'liberal' form, however, the federal state developed its national social insurance schemes, such as unemployment insurance, so that they "kicked in only when the market or family resources failed" (White, 2005, p.5). Further, the depth and coverage of these programs was limited, "leaving considerable responsibilities in the hands of families and voluntary and community organizations, much as they had been in the past" (White, 2005, p.5).

Although the federal government at this time was "placed front and centre in the development of the Canadian welfare state" (White, 2005, p.6), provinces, and some municipalities, retained key roles in the delivery of social welfare services. The provinces were responsible for social policy administration and received federal CAP funding as long as they provided assistance "without qualification or condition to all people to be 'in need' or 'at risk' of being in need" (Herd, Mitchell & Lightman, 2005, p.67). Provinces, at least in principle, were therefore "prohibited from attaching requirements to the receipt of welfare" (Lightman, Herd & Mitchell, 2006, p.124).

While reliant on the federal government for funding, the provinces retained constitutional responsibility to design, manage, provide and regulate most of the social programs in their regions, resulting in a series of divergent provincial systems (Boychuk, 1995; White, 2005). Some provinces also relied heavily on municipalities and voluntary/charitable organizations to deliver services in areas where they had provincial jurisdiction (White, 2005). For example, the province of Ontario pursued a managerial

system of social welfare which involved reliance on municipalities and the nonprofit sector (White, 2005). The Ontario government took on the “responsibility for providing programs for the disabled or otherwise “unemployable” population, but [left] municipalities responsible to deal with other risks, such as sickness, separation or divorce, and long-term unemployment” (White, 2005, p.6). Many municipalities during this period, therefore, received support, operationally and financially, from their provincial governments, resulting in the emergence of a widely cast net of social welfare services at the local level.

2.2.3 Multiscalar Welfare State Reform

The nature of Canadian welfare state ‘reform’ is highly contested. Some theorists, such as Jessop (1994) argue that state restructuring reflects a ‘hollowing out’ of the state via mechanisms of decentralization, privatization and the devolution of services. Others, however, argue for a more nuanced scalar analysis of welfare state reform. Graefe (2006(a)), for example, suggest that “[w]hile social forces bearing a neoliberal project of state restructuring managed to significantly transform the policy” their overall influence has been exaggerated, leaving the ‘liberal’ social welfare structure intact (p.94). Peck (2002) also argues that the prevailing neoliberal vision of rescaling, which “portrays an eviscerated national (welfare) state” is unrealistic (p.332), and rather than a ‘hollowing out’ of the role of the nation state, what has actually occurred is a rescaling of welfare state policies resulting in extralocal rule regimes and transformations embedded within scales. Peck & Tickell (2002) also argue that social welfare state reform has acted to

both ‘roll back’ and ‘roll out’ the national welfare state, in which neoliberal reforms are transferred to other sectors and scales of the welfare state diamond.

Regardless of one’s view on social welfare reform, it has had a significant impact on the various scales of action, resulting in the rescaling of social welfare policy at the very least. Rescaling has occurred “across a cluttered and contested institutional landscape in which newly emergent ‘projected spaces’ interact conflictually [*sic*] with inherited regulatory arrangements, leading in turn to new, unforeseen and often highly unstable layerings of political-economic space” (Peck, Theodore & Brenner, 2009, p.57). The process of rescaling social welfare policy, therefore, simultaneously entails the “elimination of some scales, the reassertion of the importance of older scales...and the creation of new ones, as well as the rearrangement of relations among existing scales” (Mahon, 2006, p.453).

During the 1980s and 1990s the ‘Golden Age’ of the Canadian ‘liberal’ social welfare state came to a stand still when major national fiscal concerns began to surface. A variety of solutions were pursued to redesign the welfare state, resulting in a profound transformation in the role of the federal government with respect to social welfare provision, and a dramatic change in how Canadian national social policy was shaped. In an effort to reduce state expenditures, the Canadian federal government began to view state involvement in social welfare as wasteful and unnecessary, choosing to instead pursue an adherence to market-oriented and individualistic solutions to social welfare problems. Despite some maintenance of the previous social liberal programs, such as health care and old age security, and moderate levels of social investment initiatives, neoliberal retrenchment came to the fore, particularly following the election of the federal

Conservative government in the mid-1980s (Foster & Meinhard, 2002(b); Mahon, 2008). Neoliberal ideology relied on the belief that “open, competitive and unregulated markets, liberated from state interference and actions of social collectivities, represent the optimal mechanism for socioeconomic development” (Peck, Theodore & Brenner, 2009, p.50). It sought, therefore, to pursue mechanisms by which to reduce state involvement, through institutional restructuring and rescaling, in favor of market oriented solutions to social welfare problems (Peck, Theodore & Brenner, 2009).

During the 1980s, motivated by both fiscal concerns and the push to “do more with less” (Laforest, 2005, p.4), the federal government pursued an agenda which sought to restructure federal state involvement, through reduced spending, revised benefits testing, privatization of many social services, and the decentralization of responsibility to lower levels of government and community organizations. The federal state, therefore, had successfully restructured its social welfare role as a residual support which would only become involved when other sectors failed. This shift marked an “erosion of social citizenship norms” (Curtis, n.d., p.4), and the reformulation of citizenship in market terms, resulting in a “massive scaling-back of rights-based unemployment benefits, the reformulation and reduction of needs-based social assistance” (Porter, 2006, Abstract).

Additional attacks on the national welfare state followed in the 1990s, ironically, when the Liberals returned to office. Inspired by the shift from ‘government’ to ‘governance’, the Liberal federal government focused on less broad-sweeping cuts to the system than the earlier Conservative government had done. Instead, in an attempt to merge economic and social policy (Chappell, 2006), the Liberal government imposed selective, yet dramatic, cuts to social welfare, favored the use of targeted services to

induce individuals into the labour market, and endorsed localized partnerships and initiatives (Elson, 2007; Laforest, 2005). The Liberal government also eliminated open-ended cost sharing with the provinces, replacing CAP with the new Canadian Health and Social Transfer (CHST) block funding, which left it open for provinces to attach mandatory conditions to the receipt of social assistance. This was soon followed by additional cuts to CHST provincial transfers in the 1995 federal budget (Lightman, 2003; Mahon, 2008).

Altogether, by the late 1990s, the federal government had successfully devolved the majority of its responsibility for social welfare management and funding to the provinces, with substantial impacts on social service delivery within the provincial and municipal governments (Swyngedouw, 2004; White, 2005). The 1999 Social Union Framework Agreement (SUFA), further codified the restriction on the federal government's right to intervene in existing or future provincial social welfare programs, guaranteeing that the federal government would never again "introduce a provision before it had won the support of a majority of provinces and territories" (Finkel, 2006, p.293).

During this period of reform, the Canadian provinces were faced with increased responsibilities for the development of social policies. Despite these increased responsibilities, however, they did not receive adequate financial support from the federal government, following the introduction of the CHST. As a result, the provinces were forced to respond, each according to its unique economic, social and cultural contexts (White, 2005; Boychuk, 1995). Some provinces continued to give social welfare high priority. Others, following the lead of the federal government, pursued a cost-cutting neo-

liberal approach to social welfare, drastically cutting back their social welfare systems, limiting funding, and tightening eligibility rules (Mahon, 2008; Lightman, 2003; Chappell, 2006). Some provinces passed responsibilities for program provision downwards to the municipalities, relying on privatization of programs and/or horizontal partnerships with community based organizations (Ismael & Vaillancourt, 1988).

In the wake of substantial federal cuts, the province of Ontario followed the latter approach. The move began under the NDP, pressed by burgeoning welfare roles and federalist management. The election of the Harris Conservative government in 1995, however, markedly increased the priority attached to decreasing provincial involvement in the delivery of social services. Under the platform of the “Common Sense Revolution”, the Harris Conservative government pursued a neoliberal platform of market reliance, working to tighten eligibility rules and drastically cut welfare supports (by 47% between 1993 and 2002) (Curtis, n.d.; Browne & Welch, 2002). After further cutting welfare funding, reducing benefits for recipients, and making it more difficult for social assistance beneficiaries to collect, “except for seniors and persons with disabilities” (Curtis, n.d., p.5), in the late 1990s there also emerged a struggle between the municipalities and the province of Ontario over social welfare reform. A re-examination of provincial-municipal roles and responsibilities resulted in the 1998 Local Service Realignment Act (LSR), which made sweeping changes to provincial-municipal relations in Ontario. These changes resulted in the responsibility for the delivery and funding of a number of social policy programs being moved from the province to municipal governments, while the province retained control of social policy creation and design (Lightman, Herd & Mitchell, 2006; Marquardt, 2007). This transfer of responsibility to

the municipalities, however, was simultaneously met with “proscriptive rules, decreased funding, and narrow performance measures” (Lightman, Herd & Mitchell, 2006, p.120).

In 1998, Ontario introduced the Ontario Works program, a compulsory work-first program which reflected a transition from ‘passive’ income supports to ‘active’, employment based welfare-to-work strategies (Lightman, Herd & Mitchell, 2006).

Directed towards ‘individual responsibility’ and the promotion of ‘self-reliance through employment’, Ontario Works aimed to provide temporary financial assistance to those most in need as long as they satisfied obligations of gaining, and retaining, employment (Lightman, Herd & Mitchell, 2006; Ontario Works Act, 1997). To minimize spending and offload social service delivery responsibilities, the province of Ontario also tightened eligibility requirements and made fiscal transfers to the municipalities and nonprofit organizations contingent upon their compliance with Ontario Works terms.

The municipal governments of Ontario during this period, therefore, had not only been given increased responsibilities, but had also become “strategically central sites in the uneven, crisis-laden advance of neoliberal restructuring projects” (Peck, Theodore & Brenner, 2009, p.49). By simultaneously downloading responsibilities, placing requirements on funding, and slashing budgets, however, the Harris government’s neoliberal ‘rollback’ project had created a social welfare crisis in the municipalities of Ontario. As a result, while various local alternatives were pursued, many cities, including Ottawa, were forced to enact cost-cutting measures, cutbacks in public services, reductions in social welfare standards, tightening of eligibility criteria, and the delegation of responsibility to other sources of social welfare provision (Peck, Theodore & Brenner, 2009).

In conclusion, social welfare reform has resulted in great changes to the multiscalar Canadian social welfare state. While ‘neoliberal’ restructuring has been increasingly challenged in more recent years, we are yet to see the impact of these changes, and the form they will take. The reality is that while some exceptions exist, the primary trend was one of decreased federal desire to provide direct funding and service delivery for social welfare services. Such changes resulted in increased responsibilities flowing down through the provincial and municipal scales, albeit within a simultaneously strained and reduced funding environment.

Scalar theory, however, reminds us that ‘states’ are not the only actors. At the local scale, not only are we able to see the impact of national and provincial social welfare policy shifts on local municipalities, but also the impact upon other non-state actors, including the community component of the welfare state diamond (Burau & Kroger, 2004; Peck, 2002). Social welfare state rescaling, therefore, has not only increasing the nonprofit sector’s responsibilities, but has also changed the relationship between the nonprofit sector and the various scales of the state. It is at the local scale, therefore, where we may best understand the multiscalar impact of government social policy reform on nonprofit sector organizations (Peck, 2002).

2.3 Welfare State Rescaling and the Nonprofit Sector

Although it is often felt that the relationship between the various scales of the welfare state and the local nonprofit sector are conflicted and strained by nature (Brock & Bulpitt, 2007), the nonprofit sector has long been part of the matrix of the social welfare system at all scales. Nonprofit organizations and charities have long played a crucial role

in the delivery of social welfare, since before the inception of the Canadian welfare state, and have always had a complex relationship with the various scales of the welfare state. Although this multiscale relationship has primarily consisted of public support of the state for the nonprofit sector, however, in more recent years it has undergone fundamental change. As the various scales of state have removed themselves from the direct provision of social services, the nonprofit sector has often been called upon to “assist with legitimating this process of disengagement and to provide residual services”, particularly at the local scale (Curtis, n.d., p.15). This increase in responsibility, however, has not been met with adequate funding levels, resulting in a volatile and insecure environment for the nonprofit sector.

During the pre-war years of Canadian social welfare, as mentioned above, state provided assistance was differentially granted by the provinces, but on the whole was based on strict Elizabethan poor-law traditions. Social welfare during this time, therefore, was primarily considered as falling to the nonprofit sector, which consisted of “religious, voluntary and charitable associations” (White, 2005, p.5). These responsibilities, however, grew following the periods of welfare state formation and reform.

Although the federal government took leadership of national social welfare responsibilities in the postwar period, the nonprofit sector’s roles remained, and further, were nourished at all scales of government. At the federal scale, the government supported nonprofit organizations, both financially and politically, as the government recognized their ability to promote collective action and to provide information for policy making (Laforest, 2005). Further, as the federal welfare state continued to expand, rather

than replacing services provided by the nonprofit sector, the government helped to finance nonprofit activities by providing wide-ranging grant-based and core funding support (White, 2005). Provincial and municipal governments also considered the nonprofit sector to be an ally of the state (Foster & Meinhard, 2002(a)), and remained tied to the sector through program and funding regimes, particularly in areas where the provincial government had “constitutional responsibility for the delivery of services, such as social welfare and health” (Curtis, n.d., p.3; Brock & Bulpitt, 2007). Of particular importance at the provincial and municipal scales were local nonprofit Social Planning Councils which took on new roles and responsibilities during this period, including local coordination and promotion of social well-being (White, 2005). Overall, funding and support for nonprofit organizations was widely available during this period. As a result, the number of nonprofit organizations grew, however so too did their dependence on government funding (Elson, 2007).

Following the period of welfare state reform, the socio-political environment in which local nonprofit organizations operated was transformed significantly, and so too were the relationships between the nonprofit sector and the various scales of government. As discussed above, in response to demands for social welfare reform, the various scales of government sought to simultaneously reduce government expenditures, increase effectiveness and efficiency, clarify roles, and rebalance the division of responsibilities for social welfare. To achieve these ends they pursued alternative solutions to social welfare coverage, which entailed not only the tightening of eligibility and coverage of social welfare programs, but also the passing along of social welfare responsibilities to ‘lower’ scales of government. At the same time, various state scales began to recognize

that they could no longer address social welfare problems on their own (Phillips, 2004), and that the nonprofit sector could play “an increasingly critical and complex role in helping to achieve the goals important to Canadians and ensure a high quality of life” (Privy Council Office, 1999 as cited in Lightman, 2003, p.112-113). As a result, the various scales of state began to seek out localized solutions through nonprofit organizations as alternative sites of programming and service delivery (Brock, 2003; Laforest, 2005).

This increased reliance took a number of different forms, ranging from enablement, partnership, and support to strict enforcement and coercive tactics (Brock & Bulpitt, 2007). At the same time, however, governments at all scales also sought to reduce the amount of funding allotted for social welfare purposes and to adjust the funding mechanisms in the direction of competitive and limited contracting regimes. Funds were not only targeted and shifted towards project-based funding and compulsory collaboration, but the various scales of government also introduced strict accountability and performance measurements (Brock & Bulpitt, 2007; Scott, 2003(b)). As a result, as nonprofit organizations came under increasing pressures to fund, deliver, and support services in the multiscalar social welfare state environment, they were further crippled in terms of their ability to fulfill growing social welfare demands.

At the federal scale, through principles of ‘governance’, such as collaboration, partnership, and networking, the government sought to introduce the nonprofit and community sector as alternative sites of programming and service delivery (Brock, 2003; Graefe, 2007; Laforest, 2005). New collaborative and cooperative relationships were pursued, although the extent to which horizontal governance and true collaboration

actually took effect is debatable (Phillips, 2003). Despite such 'relationship' tactics, in the wake of social welfare cuts by both the Conservative and Liberal governments, nonprofit organizations were left stunted, as the funding relationship shifted to short-term contracts clouded by "strict government guidelines and reporting requirements" (Elson, 2007, p.52). The advocacy function of nonprofit organizations was also limited, as the Liberals in the 1990s selectively cut funding to advocacy groups (Elson, 2007).

The relationship between the province of Ontario and the nonprofit sector had always been a "complex network of programs, obligations, and interests" which tied the government and nonprofit sector together (Brock & Bulpitt, 2007, p.10). During the period of Ontario reform, however, this relationship deepened as the province experienced increased responsibilities for social welfare programming. Especially after the election of the Harris government, the Ontario government sought to enhance individual responsibility and market reliance and reduce the role of the provincial welfare state, while also recognizing the role of nonprofit organizations. As a result, the number of contracting and partnership arrangements with the nonprofit sector increased, bringing with it strict funding conditions (Brock & Bulpitt, 2007). The relationship between the provincial state and the nonprofit sector, therefore, became complex, consisting of increased responsibilities falling to the nonprofit sector in the form of unequal and coercive 'partnerships', because the Ontario government remained "reluctant to relinquish its directive role particularly in core program and policy areas" (Brock & Bulpitt, 2007, p.11).

Lastly, while there is minimal research available to explain the socio-political environment within which local nonprofit organizations must function at the local scale,

one can see that while Ontario municipalities in the past had looked to the nonprofit sector to develop and coordinate public welfare services, this reliance increased in the name of social welfare offloading and financial purse tightening. For example, as the individual municipalities within the Ottawa region were amalgamated in 2001, the new “City of Ottawa” began to recognize the contributions and value of the nonprofit and voluntary sector, as crucial to the socio-economic health of the City (SPCO, 2001(a)). The City has, since that time, sought the participation and the involvement of the nonprofit sector, including attempts to recognize the needs of the sector, as organizations which can and do assist the city to address the city’s challenges and needs.

2.4 The Local Nonprofit Sector in the Canadian Multiscalar Welfare Diamond: Advantages and Challenges

“It is indeed interesting times for the nonprofit sector in Canada...new pressures, new challenges intermingle with the old, causing voluntary organizations to adapt to present conditions and anticipate future trends...these organizations are redefining their relationship with governments...adapting [to] decision-making styles, and altering their behavior to respond to these shifting imperatives” (Brock, 2003, p.1).

The increase in the roles and responsibilities of the local nonprofit sector serves a number of advantages, to both the state and the communities in which they operate. As mentioned above, governments cannot solve, nor fund, all social policy issues on their own, and they actively seek localized solutions through nonprofit organizations (Canadian Council on Social Development [CCSD], 2006). As a result, the various scales of governments are increasingly supportive of providing (limited and restricted) financial transfers to nonprofit organizations. Governments also acknowledge that local nonprofit organizations have the ability to function as flanking organizations to the

various scales of the neoliberal state, within the financial limitations set by the primarily neo-liberal context (Graefe, 2007). Governments also acknowledge that such local nonprofit organizations have the advantage of local scope, and their focused missions can supplement government projects while addressing critical issues within the community (CCSD, 2006). Lastly, nonprofit organizations are also seen as having the ability to contribute to the social economy, by contributing to employment levels in the labour market (Graefe, 2007).

In addition, such organizations also serve a benefit to their local communities, being simultaneously “service delivery agents, advocates, community builders, and social innovators” (Scott & Pike, 2005, p.7). One advantage is that many local nonprofit organizations are better equipped to fulfill the needs of socially excluded populations. Such organizations are also able to utilize a wide variety of diverse and culturally appropriate services in the community which the state cannot, or will not, participate in (Hall & Banting, 2000; Lightman, 2003). Further, nonprofit organizations do not always operate as blind cogs to the neoliberal mission. Rather, they also have the ability to operate in an innovative fashion at the grassroots level (Badelt, 1999; Graefe, 2007). With their fingers on the pulse of their local communities, nonprofit organizations have a direct link to their clientele, and know what the needs and demands truly are. In addition, due to the lack of profit motive, nonprofit organizations are also often viewed as more trustworthy than government in the delivery of sensitive public services, and are also more flexible than bureaucratic government structures, with some being able to manage and maintain critical attention to accountability, reporting and efficiency (CCSD, 2006; Hall & Banting, 2000; Lightman, 2003; Scott & Pike, 2005).

Aside from direct service delivery, such nonprofit organizations also have the ability to promote community and social well-being by acting as “institutional tools to prevent social exclusion or to re-integrate citizens that are already affected by social exclusion” (Badelt, 1999, p.13). This goes beyond simply looking at exclusion from social welfare supports granted by the state, but also looking at “all subsystems of society” and their effects on levels of social exclusion (Badelt, 1999, p.13). For example, nonprofit organizations and foundations can act as community development agencies by helping to make connections between root causes of social exclusion in society and individuals (Badelt, 1999). Nonprofit organizations also promote inclusion by “creating preconditions for economic integration” (Badelt, 1999, p.14), including playing a role in the rising ‘social economy’ by providing employment, training, and education to the socially excluded (Gough, Eisenschitz & McCulloch, 2006). Nonprofit organizations also enhance social capital by helping to form social networks between individuals who use nonprofit organizations.

By providing a multiscalar perspective on issues important to social policy development, nonprofit organizations may also promote awareness and advocate for policy change (Badelt, 1999; Laforest, 2005). For example, some nonprofit organizations have direct access to policy makers through networks and relationships, and therefore have the opportunity to open the channels of communication and become “important participants in public policy debates” (Lightman, 2003, p.235). Others make change and influence social policy in more indirect ways, through the work that they undertake and the voice that they give to the community (Graefe, 2004). As noted by Scott (2003(b)),

nonprofit organizations are able to “act as the conscience of our communities...they remind us of what is happening to people who are left out or treated unfairly” (p.15).

Despite the contribution of the nonprofit sector to the welfare diamond, the increased responsibilities placed upon it have resulted in a number of challenges. The primary challenge is that the increased responsibilities placed upon the sector have “not been accompanied by adequate financial compensation” (Andrew, 2008, p.242).

Although the various scales of government continue to play a central role in the funding of nonprofit organizations (particularly at the federal and provincial levels), state funding levels have been drastically cut in the last twenty years (Brock, 2003; Phillips, 2003). For example, in the mid-1990s the federal government reduced its overall funding of nonprofit organizations by \$200-\$300 million dollars (Chouinard & Crooks, 2008, p.176.). Correspondingly, the Ontario government also significantly cut its funding by \$772 million in 1996 alone (Chouinard & Crooks, 2008, p.176). In more recent years, the impact of the economic recession has also resulted in increased demands on the sector paired with inadequate funding levels. Ultimately, what has appeared is that “decades of government underfunding and cutbacks have left agencies under-resourced and overextended at the best of economic times”, and incapacitated at the worst of times (SPNO, 2009, p.1).

Much of the available funding has also become increasingly insecure as it has shifted away from “long-term core funding...in favour of short-term contract or project-based funding” (Chouinard & Crooks, 2008, p. 174). While other more ‘traditional’ forms of government funding continue to exist, in the form of contracts for start-up, delivery and other costs, they have been limited and provided on an increasingly

competitive basis (CCSD, 2006). In addition, there is also a growing focus on targeted funding for specific “performance based projects” (Curtis, n.d., p.9). For example, “[t]he employment placement component of Ontario Works is administered through performance based contracts” and nonprofit and social service agencies only receive funding from the government in the case of successful client placement outcomes (Curtis, n.d., p.9). This insecure and fragile funding environment has resulted in a universal sense of uncertainty within the nonprofit sector, as organizations must concern themselves with issues of sustainability and competition (Curtis, n.d.; Phillips, 2003; Scott, 2003(b)).

There has also been a call from funders to increase efficiency and accountability for investments made. As noted by Light (2000), “...funders, be they governments, charitable foundations, or individual givers, have never seemed so insistent about economy and results, while its clients, be they communities or individuals, have never been more demanding about efficiency and responsiveness” (p.v, as cited in Richmond & Shields, 2003, p.10). As a result, many funders, including public foundations, are shifting from giving general ‘mission support’ to funding for targeted projects with strict reporting requirements (CCSD, 2006; Scott & Pike, 2005). This reflects a desire for increased economic and social impact analysis, performance measurements and outcome effectiveness. Governments want to know that their grants and contracts are being spent wisely, funders and foundations “want to know whether the programs they fund are making a difference” (Flynn & Hodgkinson, 2001, p.4), and organizations themselves also want to know that their funding is having an impact on the community (Wolpert, 2001). As a result, nonprofit organizations are increasingly required to perform accountability and performance measurements (CCSD, 2006; Curtis, n.d.). These

requirements, however, put several nonprofits at a disadvantage, as they may not possess the skills, finances, or human resources to fulfill them (Laforest, 2005).

In light of this, much of the nonprofit sector is struggling in the face of “significant pressures for change” (Graefe, 2004, p.9), as agencies “have diverted scarce resources from community building and service provision work to chase additional dollars” (SPNO, 2009, p.1). As a result, the sector has been forced to “adapt to the more complex environment of service delivery and to acquire greater capacity to meet new challenges inherent to it” (Laforest, 2005, p.109). Nonprofit organizations find themselves in an increasingly competitive environment (SPNO, 2009), and struggling to remain relevant to the federal and provincial budgetary “radar screens” (Brock, 2003, p.11-12). They are feeling a pressure to “commercialize” (Curtis, n.d., p.15) and “professionalize” (Graefe, 2004, p.11) their services, or to re-organize themselves in a more “business-like” manner to improve service provision, efficiency and effectiveness (Dart, 2004, p.289). As a result, advocacy functions have become harder to sustain, as organizations must focus on receiving adequate financial resources to fulfill their primary service delivery missions (Laforest, 2005). There is also growing evidence that some voluntary organizations have altered their missions as they learn to follow the money (Laforest, 2005, p.75).

Some view such shifts as having a negative impact, as nonprofits may feel the need to sacrifice social goals and prosocial values for ‘bottom-line’ thinking (Dart, 2004). Others, however, see this transition in a more positive light. For example, many agencies, from their experiences of organizational fatigue and financial limitations, are turning to alternative forms of partnership and collaboration with other organizations in

order to address the rising needs in the community (SPCO, 2001(a)), and to “unlock innovation processes in social sector organizations” (Dart, 2004, p.307).

In conclusion, the nonprofit sector has always been of great value in the Canadian multiscalar social welfare diamond, however, the increased roles and responsibilities that have fallen to the sector have been both “empowering and crippling” (Laforest, 2005, p.79). The move to ‘governance’ and increased collaboration, partnering and networking between the scales of the social welfare state and the nonprofit sector have allowed it greater “access and recognition of their importance and value” in the social welfare diamond (Laforest, 2005, p.79). The various scales of the welfare state have increasingly looked to the local nonprofit sector to provide direct, efficient, reliable, trustworthy and cost-efficient services at a local level. Nonprofit organizations are also extremely important at the local community level, as they are community builders who enhance social inclusion, and at times are looked to fulfill an advocacy and policy role.

2.5 Conclusion

Although the sector is faced with unique challenges, particularly following periods of welfare state reform, in this chapter I have shown that the nonprofit sector continues to play a vital role in social welfare diamond. Such organizations are important organizational vehicles through which citizens can “respond to community, social or personal needs outside the public and the commercial sector” (Hall & Banting, 2000, p.3), and they help communities to weave a strong societal fabric, as they intersect with other sectors of the welfare state diamond and promote social inclusion. Now, more than ever, following decreases in social welfare coverage, the emergence of harsher social

welfare environments, and shifting welfare state priorities, these “alternative sources of assistance and support have become even more crucial” to the meeting of citizen needs and promotion of social inclusion (Chouinard & Crooks, 2008, p.178; Herd, 2002).

Moving forward, to identify the roles of the United Way/Centraide Ottawa in tackling social exclusion, we must identify the socially excluded populations of Ottawa. To do so, the next chapter will provide a greater understanding of the multidimensional factors which contribute to social exclusion in Canada. This will be followed by a closer look at the socially excluded populations in Ottawa in chapter four. It is these population groups who are most in need of the services and supports provided by Ottawa-based nonprofit organizations, including those that are funded and supported by the United Way/Centraide Ottawa.

CHAPTER 3 – Social Exclusion and the Canadian Welfare State

3.1 Introduction

To understand the United Way/Centraide Ottawa's contribution to tackling issues of social exclusion we must identify the socially excluded population groups in Ottawa. To do so, we must first attempt to understand the factors which contribute to the process of social exclusion in Canada. While a society may perpetuate social exclusion in a number of different ways, to understand the process of social exclusion in Canada, this thesis will focus on two factors; social welfare state restructuring and stratifying social citizenship frameworks.

Beyond creating spaces for nonprofit organizations, social welfare state restructuring has also resulted in many citizens experiencing aggravated levels of social exclusion. As social welfare responsibilities have been rescaled, funding cut, and social policies redesigned, it is not surprising that levels of social exclusion have increased dramatically. This understanding, while providing a general overview of the impact of welfare state reform on social exclusion, however, does not help to explain the very specific patterns of social exclusion which exist in Canadian society. Various sources paint a clear portrait that certain socio-demographic groups are more likely to face greater degrees of social exclusion in Canada, particularly women, immigrants, racial and/or ethnic minorities, disabled people, children and youth, the elderly and Aboriginal peoples (Bhalla & Lapeyre, 1999; DeCoito, 2008; Mitchell & Shillington, 2002; PHAC, 2004; SPCO, 2008(a)). To understand the socially excluded patterns in Canada, therefore, this chapter will also explore the structured forms of division and stratification which inform the processes and outcomes of social exclusion in Canadian societies. In other words, I

will seek to understand how welfare states themselves give rise to patterns of inequality which shape the boundaries of social citizenship and perpetuate the social exclusion of particular populations.

By investigating the impact of welfare state restructuring as well as the inherent patterns of inequality embedded within the Canadian social welfare state, we will better understand the causes of social exclusion in Canada. This chapter will show how social exclusion in Canada is a multidimensional process and outcome that, while aggravated during periods of welfare state reform, is deeply rooted in patterns of inequality acted out in uneven social citizenship and social welfare regimes. Chapter four will then address social in Ottawa. Through these two chapters the reader will be made aware of the gaps in Canada's, and Ottawa's, economic and social policies, and see the particular spaces within which the nonprofit sector of the Canadian welfare diamond acts.

3.2 Social Exclusion and Welfare State Reform in Canada

As mentioned in chapter two, in the 1980s and 1990s neoliberal policy makers in the Canadian welfare state argued that state intervention in social welfare was wasteful, expensive and ineffective (Laforest, 2005). Subsequently, there occurred an "ideological shift towards the supremacy of self-adjusting free market mechanisms", aimed at dissolving the previous social welfare supports that had been in place (Bhalla & Lapeyre, 1999, p.2). This transition served to reduce state intervention in favour of market-related solutions to social welfare, and brought with it a "reconstruction of citizenship as 'market citizenship' which, in contrast to the social citizenship of the postwar state, seeks to enable participation and inclusion within the economic order" (Jayasuriya, 2006, p.2).

As a result, significant changes have occurred at all scales of the welfare state, motivated by the desire to decrease state involvement and funding of social welfare responsibilities, and increase reliance on individuals and the market. Reduced funding by the federal government was accomplished through massive budgetary cuts at the federal scale, reductions in state spending on social welfare programs, the elimination of CAP in favour of CHST block grant funding to the provinces, and the diminishment of benefit levels to welfare recipients. For example, during the 1980s and 1990s, unemployment insurance (UI) experienced substantial cuts and reductions in eligibility. Thus, although approximately 96% of Canadians were eligible in the 1970s, by 1989 cuts had restricted access to only 85% of the unemployed in Canada (Finkel, 2006, p.294). This was further reduced in the 1980s, with only 41% being eligible for the newly renamed employment insurance (EI) coverage by 1997 (Finkel, 2006, p.294).

Social assistance programs at all scales also underwent a series of changes, all of which were centred around the tightening of the previously ‘passive’ social welfare system and increasing the ‘active’ reliance on individuals and the market. This resulted in a “massive scaling-back of rights-based unemployment benefits, [and] the reformulation and reduction of needs-based social assistance” (Porter, 2006, Abstract). Changes included the reduction of universal coverage in favour of welfare-to-work programs, redefinition and tightening of benefit eligibility criteria, disqualification of certain individuals all together, and the introduction of coercive, punitive and stigmatizing elements to those receiving benefits (Lightman, 2003; Silver, Shields, Wilson & Scholtz, 2005).

At the same time, the provinces were also undergoing significant cuts and limited entitlement definitions as signalled from the federal government (Mahon, 2008). In the 1990s, the Harris government slashed welfare expenditures, cut social programming, and increased reliance on municipal governments. Further, with the devolution of primary responsibility for social programs, the federal government also turned a “blind eye to provincial actions that eroded universal access” (Finkel, 2006, p.292). The transformation of social welfare policies at the federal level also resulted in a change in support from passive to active social policies at the provincial scale, such as Ontario, including a transformation of funding from the provinces to the municipalities in the form of support for local welfare-to-work initiatives (Lightman, Herd & Mitchell, 2006).

While the agenda of welfare-to-work was introduced at the federal level, at the provincial and local levels there was much variation in terms of its structure and implementation. Due to the variability allowed with the CHST, some provinces pursued social liberal or inclusive versions of welfare-to-work program experimentation (Mahon, 2008). Such views emphasized that social assistance supports and social investment strategies should ‘enable’ recipients to become self-sufficient, including the provision of “training and other employment supports like childcare” (Mahon, 2008, p.352; Lightman, Herd & Mitchell, 2007). Others, however, faced with sweeping reductions to welfare rates and tightened eligibility requirements, pursued a more neoliberal approach to welfare-to-work, including British Columbia and Ontario.

Within Ontario, many cities were faced with provincial funding for social welfare programs that had become contingent on their adherence to welfare-to-work principles. Further, provincial social assistance rates were slashed in the mid-1990s and eligibility

requirements tightened, leaving Ontario municipalities to reluctantly pursue the implementation of Ontario Works programming in order to receive funding (Lightman, Mitchell & Herd, 2003). As a result, in an effort to manipulate programming activities to maximize funding, many Ontarian municipalities emphasized taking the shortest route possible to helping individuals engage themselves in the job market, rather than training and promoting long-term human capital development (Lightman, Herd & Mitchell, 2006; Silver, Shields, Wilson & Scholtz, 2005). This placed a greater priority on “rapid labour force attachment through compulsory participation” (Lightman, Herd & Mitchell, 2007, p. 23).

Following such neoliberal shifts, however, a new social problem began to emerge. The reality was that, in practice, Ontario’s neoliberal methods were not improving social conditions for citizens. Despite the state’s efforts to promote ‘inclusion’ through active labour market policies, striking gaps grew and levels of economic polarization rose (Chappell, 2006). Welfare-to-work programs had also proven to be incredibly dysfunctional and disruptive, resulting in pervasive market failures (Peck, Theodore, Brenner, 2009). As a result of such failures, a growing number of social assistance recipients began to find themselves “on the fringes of society” (Bhalla & Lapeyre, 1999, p.3), suffering from social inequalities, increased levels of economic and social deprivation, and persistent problems of social insecurity (Byrne, 2005; Peck, Theodore, Brenner, 2009; Lightman, Mitchell & Herd, 2005; PHAC, 2004). This situation has only gotten worse for many following the most recent economic downturn in Canada, which hit Ontarians particularly hard (SPNO, 2009).

There are two main reasons why the neoliberal vision, that social inclusion implies labour market integration, aggravated levels of social exclusion. First, market-based solutions and programs such as Ontario Works are non-functional employment programs, particularly in light of an increasingly unequal Canadian labour market (Lightman, Herd & Mitchell, 2006). Such programs do not focus on the creation of good-quality jobs that allow for an acceptable standard of living, nor do they take into account the unstable and increasingly polarized Canadian labour market (Lightman, Mitchell & Herd, 2005). Rather, the resulting jobs were typically precarious (part-time and part-year), contract-based and insecure jobs without adequate benefits (Silver, Shields, Wilson & Scholtz, 2005). Second, in pursuing such welfare-to-work programs, the various scales of the Canadian welfare state failed to take into account the other factors involved in the process of social exclusion. Such programs tended to “favor explanations of poverty that stress individual failings such as deficient education or work experience” while downplaying other systemic factors such as labour demand or the structure of employment opportunities (Lightman, Mitchell & Herd, 2005, p.96). In doing so, they fail to “address the reality that social exclusion is not simply a consequence of individual failure or welfare state policies” (Silver, Shields, Wilson & Scholtz, 2005, p.35), but is rather the result of a wide variety of structural, social, demographic, political and economic forces. It is not surprising, therefore, that welfare-to-work approaches had proven to be “insufficient for addressing unemployment, social exclusion, and economic inequality”, and had rather worked to pronounce the levels of exclusion and social polarization (Lightman, Herd & Mitchell, 2006, p.126).

From the previous discussion we can see that welfare state restructuring and an emphasis on labour market integration has contributed to social exclusion in Canada. This, however, does not help one comprehend the patterns of social exclusion that exist in Canadian society. To do so, we must move beyond the discourse that “integration into the market equals ‘inclusion’ in society” (MacDonald, 2003, n.p.), and look to the deeper patterns of inequality that are often overlooked in Canadian social policies and institutions. To understand why certain population groups are more socially excluded than others, therefore, we must recognize that the history and experience of social exclusion is interwoven with the theories and practises of social citizenship and social rights. A nation-state’s social welfare and citizenship boundaries are intricately linked to the process of social exclusion, and such deeply rooted patterns of inequality continue to inform and penetrate social policy today. The reality is that welfare state retrenchment has only exacerbated the levels of division and exclusion that already characterized the relationship between vulnerable groups and the social welfare system (Ellison, 2007).

3.3 Social Exclusion as Unequal Citizenship in Canada

Social exclusion is best defined as a multidimensional and dynamic process and outcome which leaves particular populations of people exposed to distancing from access to social supports and social opportunities, and a lack of power to change their outcomes (Mahamoud, 2004; SPCO, 2008(a)). Being socially excluded, therefore, implies a sense of unequal citizenship status (Abbott, 2000; DeCoito, 2008; SPCO, 2008(a)). Seen in this light, social exclusion “directs us to pay attention not only to the act of oppression but also to the consequences of oppression in our development of social policies and

programs” (DeCoito, 2008, p.1-3). This understanding also acknowledges that there are broader forces that contribute to social exclusion beyond shifting social welfare policies. As noted in chapter one, such forces relate, in part, to the founding elements of a social welfare state’s form and function – their definitions of citizenship and corresponding structures which work to systematically stratify citizens (de Haan, 1998; Mitchell & Shillington, 2002). Although social welfare systems were designed with the intention of influencing structures of inequality (Morissens & Sainsbury, 2005; Marshall, 2007), welfare states also contain inherent practices of inequality which “stratify persons in terms of whether they are entitled to particular benefits, and differentials in benefit levels lead to a stratification of beneficiaries” (Morissens & Sainsbury, 2005, p.639-640).

Welfare states stratify in other ways that go beyond class. Such stratification systems include inequalities based on gender, race, ethnicity, disability or age, among others (Christopher, 2002; Morissens & Sainsbury, 2005; O’Connor, 1993; 1995; O’Connor, Orloff & Shaver, 1999; Orloff, 1993; Williams, Wood & Gough, 2006; Yeates, 1995; Yuval-Davis, 2007). These patterns of inequality work to inform conceptions of social citizenship, which thus reinforce barriers to social inclusion (DeCoito, 2008; Saloojee, 2009; Yeates 1995). Despite the fact that ‘equal’ social rights may exist in legal doctrines, such as the Canadian Charter of Rights and Freedoms, dominant societies define their boundaries to social citizenship in relation to these categories, and execute these boundaries via their welfare state mechanisms (DeCoito, 2008; London School of Economics and Political Science [LSE], 2009; Yeates, 1995). Such a “tiered system of access to social rights” results in unequal citizenship which then

perpetuates the separation and social exclusion of particular groups (O'Connor, 1993, p.504). This act of separation

“involves the dominant group separating others into different groups, assigning different values or levels of worth to those groups, and allocating resources and opportunities in accordance with those assigned values...the least valued groups are usually described as the socially excluded or socially marginalized because of their limited access to the resources and opportunities in society” (DeCoito, 2008, p.1-6).

In applying this approach to Canada, we see that although Canada claims to offer equal citizenship for all, the existence of socially excluded groups reflects the fact that Canadian citizenship is, in fact, unequally applied. Canada's social welfare system was designed and intended with the white, able-bodied, working, English-speaking, European male population in mind (DeCoito, 2008). Based on these boundaries, those who lie outside this framework continue to experience limited access to social citizenship entitlements and greater levels of social exclusion (Basok, 2004; DeCoito, 2008). Such unequal social citizenship is further exacerbated during periods of welfare state reform and cutbacks. A brief analysis of a series of such exclusions is provided below.

3.3.1 Women

Feminist scholars argue that the foundations of the Canadian welfare state have systematically worked to subordinate women to men (Finkel, 2006; Little, 1998). While the introduction of female-oriented supports, such as mother's allowances and the ensuing family benefits, may seemingly challenge this conception, the state has nonetheless retained a patriarchal and moral regulation role of women (Little, 1998). This has been accomplished through social welfare policies founded upon a gendered-

social citizenship regime, focused on the public male-citizen worker, with women falling to the private family sphere, and a single conception of the family wage, comprised of a male breadwinner with a dependent wife and mother (Finkel, 2006; Little, 1998). The social welfare state policies that have followed from such conceptions have, therefore, attempted to impose a particular view of women, as wives, mothers and housekeepers, with the majority of Canadian social welfare policies being directed towards protecting male-breadwinning-heads of household. Many women have only been provided secondary and insufficient, means-tested, and morally regulated supports which have not provided enough support to women for them to be granted with independence or equal citizenship (Finkel, 2006; Little, 1998).

Even as the state began to recognize the importance of women's participation in the labour market during the period of welfare state formation, the state continued to make it difficult for women to choose to work. For example, regulations and restrictions to labour force participation, differentiations between male and female appropriate labour, differential access to unemployment insurance, and continued expectations that women were to continue to provide care duties, all restricted women's ability to enhance their position in the labour market (Finkel, 2006). Further, several attempts at national, or provincial, publicly provided quality and affordable childcare have failed, as the state, albeit with few exceptions, has continued to view women's role as taking care of the family in the home (Finkel, 2006).

These conceptions continue to play out in more recent Canadian history, albeit in slightly different ways, as the focus has shifted from 'social' to 'market' citizenship. Throughout the period of reform there were significant reductions in family benefit

supports, universality was removed, and women were expected to work in the labour force with no acknowledgment of their retention of care-giving responsibilities (Finkel, 2006). Further, throughout the period of reform, the policy discourse also shifted from 'families' to 'children' which led to family allowances being discarded in favour of limited Child Tax Credits, which were often distributed based on welfare-to-work incentives, leaving lone mothers particularly vulnerable. Worse yet, state supported initiatives for equal pay and equal access have not affectively altered the gendered patterns in the public sphere (O'Conner, Orloff & Shaver, 1999), and any attempts at a national (and/or provincial) child care system were formally taken off the public agenda in the late 1980's (Finkel, 2006). Taken together, social welfare reforms have not provided women with the adequate resources or supports to gain respect as equal individuals or citizens. Rather, they have worked to reproduce a gender hierarchy by (1) privileging full-time paid workers over those who do unpaid or part-time work in a domestic or caring capacity, and (2) reinforcing a gendered division of labour, in which women do most of the unpaid work (Orloff, 1993). The services and supports for women in Canada continue to be heavily means-tested and stigmatizing, reflecting a public and private gendered assumption of women's duties in the private sphere (Finkel, 2006; Little, 1998).

The reality is that welfare states continue to affect gender inequality, as social policies are primarily geared towards helping men, not women, let alone single mothers (Christopher, 2002). In Canadian society there remains an underlying system of stratification which ranks citizens based on gender ('men above women'), and attributes gendered roles to women and men in society, to the point that gender can now be found

“embedded in the structures and institutions of [Canada]...in our way of thinking and talking, in our beliefs and attitudes, and in employment, education, politics, the family, and leisure” (Abbott, 2000, p.55). Women’s vulnerability to poverty and social exclusion in contemporary society, therefore, is in part due to their gendered roles in both the private and public sphere, and the weak position that they hold in the labour market both occupationally and financially.

3.3.2 Children and Youth

Despite the increase in focus on child poverty and social exclusion in Canada since the late 1980s, the Canadian welfare state continues to contribute to the social exclusion of children by systematically denying “identifiable groups of children the opportunity for healthy development” (Hertzman, 2002, p.1).

Factors that influence the exclusion of children and youth include a lack of affordable early learning and child care spaces, lack of support to parents (in particular single parents and women), a need for employment equity programs for women and racial/visible minorities, and a lack of affordable housing for families and children (Finkel, 2006). Further, children in particular family types are more likely to suffer social exclusion, with rates being “significantly higher for lone mother families, children with disabilities, and children in Aboriginal, racialized and immigrant families” (Campaign 2000, 2008, p.2).

The social exclusion of children and youth is most importantly affected by their direct environments, which in most cases, relates to their family structures. For families with young children, a large part of social exclusion is the “challenging conditions which

some parents face” (SPCO, 2007(a), p.5). For example, the social exclusion for families with children is reflective of a combination of factors including the “attitudes, process and barriers which push...families away from participating in opportunities to support their children’s learning and development” (SPCO, 2007(a), p.5). Although public policy has increasingly shifted to focus on ‘the child’, such actions have negatively reinforced barriers to family supports, encouraged labour market integration, and excluded certain population groups (Finkel, 2006). As a result, “social policies that increased poverty among adults inevitably increased poverty for their children”, and the new focus on the child in the late 1980s brought with it restrictions to previous benefit levels thereby working to increase poverty levels of certain children (Finkel, 2006).

While various types of social policy supports and programs have been available, the reality is that they have been inefficient, not equally accessible, and ill-equipped to influence child poverty levels. For example, the New Integrated Child Tax Benefit (NICTB) was introduced as an “income-related benefit meant to assist low-income mothers”, however it was insufficient to undo the poverty levels experienced due to provincial social assistance cuts at the time (Finkel, 2006). Further, while the Child Tax Benefit (CTB) was meant as an anti-poverty tactic, many low-income children are excluded from receiving it, making it an inefficient method by which to bring the child poverty rate down to a single digit in Canada (Shillington, 2003). Further, many provinces used the CTB money available from the federal government to impose work-incentives, leaving mothers, particularly those who stay at home, in difficult situations (Finkel, 2006). In addition, the federal government has also saved billions of dollars by abandoning commitments to increase the supply of child care services in Canada

(Caledon Institute of Social Policy, 1994). Overall, “with the exception of Quebec, there has been little done to expand Canada’s childcare system to meet the needs of the increasing number of working mothers” (SPCO, 2009(b), p.8).

There are, however, recent changes in the making. For example the Ontario Government’s Poverty Reduction Strategy aims to reduce the number of children living in poverty by 25% over the next 5 years (Government of Ontario [Ontario], 2009). Strategies include increasing the minimum wage and increasing access to the Ontario Child Benefit (OCB) for low-income families, investments in education, supporting community involvement, and a review of social assistance policies (Ontario, 2009). The outcomes of these policies, however, remain to be seen.

3.3.3 Visible and Ethnic Minorities and Immigrants²

Historical conceptions of citizenship that underpin social policy, which imply the white-man-as-ideal-citizen, continue to practice racist processes that work to deny visible and ethnic minorities and immigrants equal social citizenship rights (Williams, 1995). Such historically held racialized views of citizenship, and the discriminatory practices that go with them, continue to produce, and reproduce, the social exclusion of visible/ethnic minorities and immigrants (Saloojee, 2003).

In the Canadian system there exists a pervasive and influential history of various social and public policies “that [were] actually intended to promote ethno-racial

² First and foremost, I must draw the readers attention to the fact that the attribution of such labels as ‘visible minority’ or ‘ethnic minority’ are inherently exclusionary in and of themselves, for they arbitrarily group people as being ‘non-white’ or ‘non-Aboriginal’ (SPCO, 2008(a)). ‘Race’ in both the past and present, has been used as a status marker and a tool for the exploitation and oppression of people, by categorizing humans into separate, fixed and hierarchical ranked races, that of being non-white (Mason, 2000). The more prominent use of the term ‘ethnicity’ in place of ‘race’ in contemporary times, does not realistically resolve this debate, as inherent racist biases remain attached to the term ‘ethnicity’. Therefore, regardless of whether one uses the term ‘race’ or ‘ethnicity’, it is important to acknowledge that both imply a ranking and process of differentiation and stratification between people, which results in social inequality, social disadvantage, and social exclusion for individuals (Mason, 2000).

inequalities, such as the *Indian Act*, the *Oriental Exclusion Act*, the *Head Tax*, the internment of Japanese citizens, etc.” (Nakhaie, 2006, p.152). There is also a “profound history of discrimination in Canada’s immigration policy” (Canadian Council for Refugees [CCR], 2000, p.1). For years, non-European immigrants were purposely and overtly restricted from immigrating to Canada (Simms, 1993). Canadian immigration policies devoted themselves to keeping Canada as white as possible, offering various levels of citizenship, or lack thereof, depending on one’s nationality (Hier & Walby, 2006). Although race has ceased to be as relevant a factor in selecting those able to immigrate to Canada, there are “...some aspects of current policies that are reminiscent of earlier forms of exclusion, and the enforcement of seemingly neutral immigration requirements continues to discriminate against certain racialized groups” (CCR, 2000, p.3).

Despite some attempts to address the situation, for example the pursuit of multiculturalism policies, such policies have been unable to appropriately deal with a Canadian system that remains “fraught with institutionalized racism” (Hier & Walby, 2006, p.86). The overt racism of the past has been replaced with more subtle forms and, to this day, integration into Canada as an ‘equal’ citizen does “not often run parallel to social, political, and economic integration” (Mata, 2002, p.190). For example, rather than overt practices of racial inequality, the barriers which contribute to the social exclusion of visible minorities and immigrants include, amongst others; labour market barriers related to immigration (lack of recognition for formal education and overseas professional experience, and stringent requirements placed upon immigrants to possess Canadian experience in order to gain employment); labour market barriers for visible and

ethnic minorities in general (limited employment access due to discriminatory practices in the workplace, higher percentages being reflected in precarious employment positions, and large income gaps as compared to the general population); differential access to social supports, such as housing; the existence of social policy supports which are not reflective of the demographic structure of visible minority and immigrant communities (i.e. inefficient family supports for working visible minority families with children); and troubling access and representation in social institutions (such as the education system) (PHAC, 2004; SPCO, 2007(a); SPCO, 2008(a); SPCO, 2008(b); SPCO, 2009(a)).

3.3.4 Aboriginal populations

A historical legacy of colonial, racist and discriminatory actions has also affected the citizenship debate for Aboriginal populations. As a result of strict and exclusive tactics, such as assimilationist policies, forced adoptions, and residential schools, and a lack of involvement of Aboriginal people in policy discussions, Aboriginal people have continuously struggled to be accepted within Canada's predominantly 'white society' (Heritz, 2009; SPCO, 2007(a)). Although the various scales of government have 'attempted' to give way to more autonomous projects for Aboriginal peoples in recent years, including the gradual extension of "full rights of citizenship" to Aboriginal persons around the 1940s, and community development projects in the 1960s aimed to integrate Aboriginal persons into provincial and municipal communities, such efforts continued to be tainted by the objective of assimilation (Shewell, 2002, ¶ 4). There has also been a longstanding debate over which level of government is to claim jurisdictional responsibility for Aboriginal social welfare issues, resulting in a lack of appropriate

attention being paid to their needs and issues (Finkel, 2006; Shewell, 2002). All together, this colonial history, associated with projects of assimilation hidden behind ambitions of 'equal citizenship', paired with the minimal involvement of Aboriginal communities in policy planning, has resulted in a "diminished self-determination and a lack of influence on policies that directly relate to Aboriginal individuals and communities" (Loppie Reading & Wien, 2009, p.2; Shewell, 2002).

Several authors believe that this colonial history, along with a lack of cultural recognition and involvement in federal, provincial and municipal policies, have continued to contribute to the disadvantaged citizenship status of Aboriginal peoples in Canada today (Battiste & Semaganis, 2002; Heritz, 2009; Juteau, 2003; Loppie Reading & Wien, 2009). Although the 1996 Royal Commission on Aboriginal People called for an increase in the autonomy of Aboriginal people, neoliberal cutbacks and inadequate funding for social services have resulted in the federal government balking at directly providing services to Aboriginal peoples, particularly those living off-reserve (Finkel, 2006). The effects of intergovernmental disputes, federal and provincial offloading of services to lower levels of government and nonprofit organizations, cutbacks in services, and the exclusion of Aboriginal groups from discussions have all "contributed to a situation that has had serious adverse effects on the ability of Aboriginal people to gain access to appropriate services in urban centres" (Indian and Northern Affairs Canada [INAC], 1996, p.551).

3.3.5 People with Disabilities

There is an unfortunate history of unequal citizenship and exclusion for disabled persons in Canada as they have “long been disadvantaged, marginalized and stigmatized” (Prince, 2006, p.97). Despite some incremental advances to the consideration of disabled peoples, there continue to exist systematic and structural barriers and erosions to public services that contribute to the social exclusion of people with disabilities (Prince, 2006).

First and foremost there are issues with institutional definitions of ‘disability status’, as the definitions used often conflict with the unique ways in which disability is experienced and embodied (Lightman, Vick, Herd & Mitchell, 2009). Persons with disabilities do not conform to a one-size-fits-all definition, resulting in the increasing complexity to their inclusion in social policy dialogues. The historically held biomedical view of disability saw it as a form of deviance and a social burden (Rioux & Samson, 2006). Founded in early medical models, this perception was “shaped and perpetuated by the notion that disability is an abnormality or a flaw” (Supreme Court of Canada, 1997; as cited in Frazee, 2003, p.1-2), which “mirrors the segregation of the poor into ‘deserving/undeserving’ categories associated with the Elizabethan Poor Laws” (Lightman, Vick, Herd & Mitchell, 2009, ¶ 5). Functional arguments, a corollary to the biomedical view, saw disabled persons as having functional, physical and mental limitations that would influence their workplace and/or social performance (Hum & Simpson, 1996). Social policies based on this view established interventions which justified the exemption of the disabled from the mainstream, as reflective of their ‘difference’ from the normative ideal (Rioux & Samson, 2006). In the late 1960s, embodied in principles of human rights, a conceptual shift occurred towards defining

disability as being caused and perpetuated by social and economic conditions (Rioux & Samson, 2006). Such views, instead, focused on the rights of those with disabilities, urging the requirement that those with disabilities be given equal opportunities to participate in society at all levels.

Such beliefs have influenced the formation of Canadian social welfare policies. Since the inception of the Canadian social welfare state, persons with disabilities have not been included in the conception of the 'ideal' social welfare recipient, the able-bodied working citizen, nor have the varieties of disabled experiences been taken into consideration. Although the federal government in the past has made commitments to improve the lives of people with disabilities, they have, however, remained minimal at best and unfulfilled at worst (Prince, 2006). Despite the existence of broadly national social responsibility policies that promote equality and inclusion, such as the Charter of Rights and Freedoms and the Employment Equity Act, no national program for disabled persons exists, as services and programs for people with disabilities remain fragmented across the provinces (Rioux & Samson, 2006). Further, while the "Canadian government recognizes tensions in the ways disability has conceptually evolved...this awareness remains largely absent in practice at the provincial level" (Lightman, Vick, Herd & Mitchell, 2009, Introduction, ¶ 1).

At the provincial level, disability-related social policies continue to assume the "individual pathology" approach (Rioux & Samson, 2006, p.137), which is all too often "disempowering or stigmatizing to those seeking a modicum of assistance to live in dignity and be active citizens" (Prince, 2006, p.99). These programs vary from province to province in terms of coverage and definition, are not portable, and are inconsistently

funded. As a result, the current provincial supports that are available are often severely inadequate, and those accessing the systems face numerous restrictions, creating significant barriers to those who are disabled.

In addition, restrictions on disability benefits have also actively discouraged their participation in the labour market. For example, although benefit levels are typically lower than what can be earned in terms of employment “[i]f [disabled persons] become employed, they fear forfeiting some or all of their disability benefits, and if they commit to full-time employment and then find they cannot maintain that employment, they may find themselves without employment income or income assistance from disability benefits” (Priest et al., 2008, p.6). In doing so, many individuals with disabilities refuse to work even on a part-time basis, out of fear of losing state-granted benefits, and for those who cannot find employment, the social welfare benefits available are so low that many disability recipients continue to live in poverty (Jongbloed, 2003).

The inception of market-oriented citizenship regimes has also further resulted in the social exclusion of some who are disabled, as many face difficulties fitting into employability requirements (Rioux & Samson, 2006, p.138). Despite the fact that employment may help to “offer material security and social status” to people with disabilities, policies that emphasize welfare-to-work strategies, including ODSP, do not acknowledge the additional barriers that disabled persons face in the contemporary labour market (Wilton & Schuer, 2005). First, people with disabilities face immense structural and systematic employment barriers, including non-accommodating and discriminatory work environments, inadequate financial payment, downgraded service occupations, and lack of opportunities due to preconceived biases of the inability of disabled persons to

work (Jongbloed, 2006). Further, such welfare-to-work strategies do not take into account the increasingly precarious work environment that has arisen, resulting in an increase in non-standard, ill-equipped work by which to secure an adequate means of survival. The emphasis on employment-focused welfare tactics, therefore, paired with clawed back benefit levels, and a lack of attention to the Canadian labour market, have not been accompanied by “strategies focused on creating contexts for employment that ensure accessibility and accommodation in particular, and job security and living wages more generally” (Wilton & Schur, 2005, p.187). As a result, this places “disabled workers in a precarious position between an increasingly hostile welfare state and a labour market in which the ‘able-body/mind’ remains a largely unquestioned norm” (Wilton & Schuer, 2005, p.186).

3.3.6 Seniors

Although public pensions were one area in which the postwar government seemed willing to move beyond the ‘residual’ nature of the welfare state, even though most seniors did not fit the prototypical ‘able-bodied conception’, they were also devised to provide no more than the bare minimum (Finkel, 2006). As a result, despite attempts to reduce the social exclusion of seniors, there remain a large number of seniors, particularly those who are females or immigrants, who are vulnerable to social exclusion (PHAC, 2006).

Seniors receive revenues from a combination of three different services: Old Age Security (OAS) along with the Guaranteed Income Supplement (GIS), the Canada Pension Plan/Quebec Pension Plan (CPP/QPP) and private savings such as RRSP’s

(National Advisory Council on Aging [NACA], 2005). Introduced in 1951, the Old Age pension plan, a cost-shared program between the federal government and the provinces, is a universal pension that all seniors receive regardless of income (Finkel, 2006).

Although universal in form, however, the supports were never enough. In recognition of this, the OAS was later supplemented by the national guaranteed income supplement (GIS), introduced in 1966, as well as various provincial GIS measurements (Finkel, 2006). With the introduction of the GIS, however, came the reintroduction of a means-testing portion to the previously universal old age pension program (Finkel, 2006).

Regardless of such public supports, both the GIS and OAS have been criticized for being unremarkably ill-adapted to bring seniors above the low-income cut-off level (NACA, 2005). In a sweeping clawback, the universal element of the OAS was also reduced in 1989, when the federal government enforced seniors making over and above a certain amount to payback set amounts on their income taxes (Finkel, 2006). This was followed in 1996, by the federal government making the OAS income-tested based on senior's incomes from the year prior, thereby completing the conversion of the OAS from a universal to an income-tested program (Finkel, 2006).

The CPP was introduced in 1965 as a further acknowledgement of the inadequate levels of OAS. The CPP is a compulsory earnings-related social insurance pension plan aimed at providing basic pension income to seniors (Finkel, 2006). Benefits, however, are dependent on the levels of previous employment, years worked, and past earnings (NACA, 2005). Further, there is a patriarchal character to the CPP. Since benefits are based on individual earnings and contributions, women were penalized due to the fact that they earned less in a period when many women withdrew from work to raise children

in the home (Finkel & Conrad, 2002). Currently CPP benefit levels are also in high debate. Since CPP is a plan by which current contributions by individuals in the labour market are used to pay for the pensions of those who have retired, due to the aging Canadian demographic, money is quickly running out for the growing number of retired individuals, resulting in the need to increase contribution rates to cover the beneficiaries.

While most-low income seniors rely on these publicly provided income security programs the levels are inadequate, and many seniors suffer from clawbacks to benefits based on earned income (Caledon Institute of Social Policy, 1994; NACA, 2005; Shillington, 2003). The federal and provincial governments have also attempted to implement further cutbacks to public pensions and CPP benefits, however, due to high levels of public support nothing has materialized over the years. With that being said, despite some modest improvements to both the GIS and CPP since the 1970s and 1980s, poverty rates of Canadian seniors continue to be high, as benefit levels continue to be monitored and regulated (Finkel, 2006).

For the purposes at hand, however, it is also important to note there is growing concern amongst seniors with intersectional attributes (Gazso, 2005; NACA, 2006). Low income is more likely for seniors who are women, Aboriginal citizens, and immigrants, particularly those who are unattached (single), which is reflective of the gendered and racialized patterns of social welfare and labour market trends discussed above (Gazso, 2005; NACA, 2006).

3.4 Conclusion

Social exclusion involves more than exclusion from the labour market. Rather, social exclusion is multidimensional by nature, containing many social, political, and economic aspects. Its roots “are deep, historical, and indeed are continually reproduced in both old and new ways in contemporary society” (Saloojee, 2003, p.3). The concept of social exclusion allows us to better appreciate the historical and complicated relationship between the individual citizen, the state and society, and the boundaries to inclusion that an individual may face within these areas (Bhalla & Lapeyre, 1999).

As we have seen, the structure (and restructuring) of the social welfare system, and the definitions (and redefinitions) of citizenship that flow from this, play a significant role in exacerbating social exclusion, both historically and in the present (Shillington, 2003). The shifts in the Canadian welfare system, away from expansive social citizenship principles to those based on market citizenship, has resulted in decreased coverage by the various scales of state in favour of market principles and individualist social welfare solutions. These shifts, however, while exacerbating levels of social exclusion due to decreased state involvement, do not help explain the patterns of social exclusion that exist in Canadian society. These patterns, rather, are the result of deeply entrenched patterns of unequal citizenship that result in the social exclusion of particular populations; women, children and youth, immigrants, visible minorities, Aboriginal peoples, persons with disabilities and senior citizens. It is these populations, due to unequal citizenship principles that are acted out within the social welfare state, who are unable to benefit equally in the opportunities and advantages of Canadian life.

By looking through the lens of social exclusion, we are able to gain a greater understanding of the ‘gaps’ in Canadian social and economic policies, and to see the potential room within which nonprofit organizations of the social welfare diamond may act to support both individuals and communities. We see that social exclusion is both an outcome and a process of larger historical, structural and socio-economic forces, which incorporates the “economic, political and social aspects of ‘distancing’” (SPCO, 2008(a), p.23). To understand the lived experience of social exclusion, however, it is important to turn to the local level. This will be done in the next chapter, where I will look to identify the particular populations and groups of individuals who are more often socially excluded in the city of Ottawa. By studying social exclusion at the local level of Ottawa, we will gain a better perspective of the processes of social exclusion present within this particular community, and the variety of social exclusions that individuals are forced to deal with. In doing so the reader will be made aware of the gaps in Ottawa’s economic and social policies, and see the particular spaces within which the nonprofit sector of the social welfare diamond, including the United Way/Centraide Ottawa, is compelled and expected to act within.

CHAPTER 4 - A Portrait of Social Exclusion in Ottawa

4.1 Introduction

Ottawa is “recognized internationally as a city with a high quality of life including average incomes above the national and provincial averages, a bilingual heritage, growing diversity, good public services, attractive green spaces and many cultural and recreational opportunities” (SPCO, 2008(a), p.20). Within the city of Ottawa, however, there exists a growing population of citizens who do not enjoy equal access to the benefits of Ottawa life and are excluded from participating and contributing at an equal level to other citizens (SPCO, 2008(a)). As a result of government restructuring, nonprofit and community agencies are seeing a sharp increase in the demand for their services and programs across all demographic groups in need. Further, the demands experienced are becoming more complex than they were previously. This chapter, therefore, will seek to answer the question: who are the socially excluded in Ottawa? In doing so the reader will be made aware of the gaps in Canadian (and Ottawa’s) economic and social policies which the nonprofit sector is expected to fill in for.

This chapter begins with a brief discussion of changes to the socio-economic structure of Ottawa, with particular attention being paid to the increasing gaps between those who are well off and those who are not. Brief mention will be made to two of the main public welfare supports in Ottawa, Ontario Works (OW) and the Ontario Disability Support Program (ODSP), and their inability to help those in need to get off of social assistance. The second half of this chapter will then identify the socially excluded communities of Ottawa.

Before moving forward, I must note a few things. First, much of the data that will be provided in this section is economic and labour-based in nature. This is due to the fact that economic exclusion is the foundation of social exclusion, and those who are given unequal access to participate in economic success, suffer greater degrees of social exclusion (SPCO, 2008(a)). Second, many of the sources are not academic in nature and, rather, are closely linked to advocacy functions for various population groups. While this thesis in no way reflects the political messaging that such organizations may represent, however, I believe it vital to use these sources due to (a) the lack of academic-based statistics and literature on the community of Ottawa in particular, and (b) the data-richness of such research that nonprofit organizations have been gathering directly from the communities whom they are trying to serve. Finally the author also acknowledges that there is no archetype or clear vision of social exclusion in Ottawa. While this chapter will attempt to provide as clear and intersectional a picture as possible in regards to the socially excluded of Ottawa, it in no way attempts to be exhaustive in its analysis of the socially excluded.

4.2 The Effects of Canadian Welfare State Rescaling on Social Exclusion in Ottawa

While there has generally been a healthy labour market in Ottawa, due to the presence of private and high-tech sectors and the federal government, Ottawa's labour market has "changed dramatically over the past twenty years" (SPCO, 2008(b), p.77). In conjunction with welfare state restructuring and an increased focus on 'activation' policies, in the late 1990s Ottawa's labour market underwent substantial changes. Since this time, service sector and non-standard, temporary, part-time and part-year

employment, or ‘precarious employment’, has been a growing trend in the city (SPCO, 2005). Such employment brings with it limited access to entitlements, inadequate wages, minimal job security, and little protection as to working conditions (SPCO, 2005).

As a result, the social policy emphasis on labour market integration and work-first strategies introduced in the mid-1990s, in fact, contributed to growing disparities between labour market outcomes, particularly for those on low or fixed incomes (City of Ottawa, 2003; SPCO, 2008(b)). Further complications have also surfaced since the recent economic downturn. In Ontario alone more than 160,000 people became unemployed in a mere eight month period, with unemployment rates reaching the double-digits following the late-2008 recession (SPNO, 2009). At the same time, however, “restrictive eligibility criteria limited access to Employment Insurance and provincial social assistance programs” (SPNO, 2009, p.2). As a result of economic insecurity, the federal government, once a relatively stable employer in the city, is also facing challenges. A recent report by the Conference Board Secretariat of Canada indicated that the federal government’s recent invocation of a spending freeze could stunt the local Ottawa economy and labour market, painting a “dismal picture” for economic growth in the years to come (Casey, 2010, April 7), with employment levels (full- and part-time) being uncertain at best.

As a result of an unstable labour market and the increase in the number of precarious jobs, there are growing income gaps in Ottawa, particularly between those earning full time and part time wages (SPCO, 2008(b)). As a result, there continues to be a portion of the population who, “despite the fact that they are working, find themselves living in poverty and unable to support themselves and their families adequately” (SPCO,

2005, p.7). Although the minimum wage in Ontario was recently increased to \$10.25 per hour it has been noted that this will unlikely have a significant impact on those most in need in Ottawa (Gordon, 2010, April 12). The increasingly unstable labour market, consisting of marginal jobs, inadequate wages, unstable supports, and a lack of future opportunities, has effectively trapped individuals in disparate cycles of economic insecurity.

Not only have employment rates and incomes changed in Ottawa as the economy has worsened, but so too has the cost of living. According to Canada's Consumer Price Index, increases in the cost of living for 2009 included: "food prices up by 5%; health and personal care costs up by 3.7%; household operations, furnishings and equipment up by 2.6%; and recreation, education and reading increased by 1.1%" (United Way/Centraide Ottawa [UW/CO], 2009, p.6). For example, in terms of secure and affordable housing, in Ottawa the "serious shortage of affordable housing is perhaps the best known of the factors which lead to vulnerability in housing...[and the] cost of housing has continued to rise, while incomes for many people have remained the same or dropped" (SPCO, 2003, p.16). In 2006, "42% of households in Ottawa spent 30% or more of their income on rent and 15% of household owners spent over 30% on their mortgage payments" (SPCO, 2008(b), p.10). Due to the shortage of affordable housing in the city, the number of households awaiting social housing has also continued to rise, from 9,913 in 2005 (Ottawa Public Health, 2006, p.8) to 9,692 in 2008 (Community Foundation of Ottawa, 2009) and 10,235 in 2009 (Alliance to End Homelessness, 2009). On average it takes "5 to 8 years to secure a social housing unit" in Ottawa (Ottawa Public Health, 2006, p.8). Further, investments in Ontario's affordable housing sector are

down by 60% over the last decade (Wellesley Institute, 2008, p.3). For example, only 88 new affordable housing units were built in 2009, while 10,235 households remained on the social housing wait list (Alliance to End Homelessness, 2009). As a result of the lack of affordable social housing, there has also been a rise in the use of emergency shelters in Ottawa (Alliance to End Homelessness, 2008; Ottawa Public Health, 2006). From 2007 to 2008 there was a 7.2% increase in the use of emergency shelters over the 2007 numbers (Alliance to End Homelessness, 2008). In 2009 the use of emergency shelters increased by another 9.6%, with the average length of stay being 57 days, 12% longer than it was in 2008 (Alliance to End Homelessness, 2009).

As polarizations worsen and the cost of living increases, particularly as a result of the recent economic downturn, a growing number of Ottawa's citizens need to access provincial social assistance systems. The Ontario government, however, has restricted and limited social assistance supports in the province over the past few decades (SPNO, 2009). As a result, there exist a number of systematic and institutional obstacles that exacerbate the experiences of social exclusion, particularly as individuals learn how "complicated, cumbersome and stigmatizing" Ontario social supports may be (National Council on Welfare, 2007, Welfare Incomes 2008). Such structures work to systematically marginalize some populations, containing them in situations of need, by applying need-requirements and asset analyses. Two such programs in Ottawa are Ontario Works (OW) and the Ontario Disability Support Program (ODSP). The benefits available from these programs have been substantially cut back since the mid-1990s, paired with harsher employability criteria, needs-based and asset-assessment regulations, and penalties. As a result, OW and ODSP reflect punitive, individualized, monitored and

intrusive approaches to addressing social need, which focus on the individual alone, and ultimately increase need through low benefit levels and restrictive requirements (Lightman, Herd & Mitchell, 2006; Lightman, Herd & Mitchell, 2007).

The reality of the current state of social assistance supports in Ontario is that they are well below the low-income cut-off line and do not accurately reflect the cost of living in Ottawa (SPCO, 2009(b)), and in 2008, the total payments to social welfare recipients were at their lowest levels yet (National Council on Welfare, 2007, Welfare Incomes 2008). After considering basic social assistance, other benefits, and various provincial and federal tax credits, a single person considered employable on average earned \$7,352, and a single person who was disabled took in \$12,647, both which were well below the 2008 low-income cut-off [LICO] of \$18,373 (National Council on Welfare, 2007, Welfare Incomes 2008). A lone parent with one child earned \$16,683 (below the LICO of \$22,361) and a couple with two youths earned \$21,215, compared to the LICO of \$34,738 (National Council on Welfare, 2007, Welfare Incomes 2008).

Taking into consideration the effects of an increasingly precarious labour market, enforced welfare-to-work strategies, increasing financial instability and rising insecurity, social assistance recipients in Ottawa are increasingly living below the poverty line, dealing daily with hunger, hunger, insecure housing and economic precariousness. In 2005, 15.2% of Ottawa's population was living on low income before taxes, with this statistic dropping to only 12.3% after taxes (SPCO, 2008(b), p.95). We also have yet to see the true long-term impacts of the recession from late 2008, in which Ontario was hit particularly hard (National Council on Welfare, 2007, Poverty Profile 2007).

In more recent years, the Ontario and Ottawa governments have each released their own poverty reduction strategies. Such strategies seem encouraging as they mark a “significant change from the terrible policies and practices of the past 15 years that have punished people who are poor for their poverty” (Wellesley Institute, 2008, p.1). While such strategies include a new focus, particularly on child poverty, as well as the inclusion of investments in the community by which to strengthen the sector, it is yet to be seen what impact such strategies will result in (Wellesley Institute, 2008).

As can be seen from above, despite Ottawa’s local economy enjoying a relatively good standard of living, many citizens continue to struggle, with the recent economic downturn ensuring that the situation will likely to worsen. Although there are general trends that reflect the population of Ottawa as whole, as summarized above, there are also certain groups who continue to be hit the hardest. It is these populations that many nonprofit and community organizations set out to service and support.

4.3 The Socially Excluded of Ottawa

As in the rest of Canada, the socially excluded populations of Ottawa are typically found to be women, children, visible and ethnic minorities, immigrants, persons with disabilities, senior citizens, and Aboriginal populations. Each population group is discussed in detail below.

4.3.1 Women

In the city of Ottawa there are more women than men in the general population, and women are also overrepresented in many intersectional categories, including those

who are seniors, disabled, visible minorities, immigrants (SPCO, 2008(b)). In Ottawa, women are also most likely to head lone-parent families, with women representing over 80% of lone-parent families in the city (SPCO, 2008(b), p.29). Beyond their statistical presence within intersectional categories, women also disproportionately experience social exclusion.

Women have lower participation rates than men in the labour market, which is partially reflective of the fact that women continue to do most of the unpaid housework and to provide care for children and seniors in the home (SPCO, 2009(b)). Although statistics show that there has been an increase in the number of women who enter the labour market, women also experience much higher rates of unemployment than men, which is indicative of the difficulties women face in accessing work as well as challenges in “accessing suitable employment” (SPCO, 2008(b), p.8). Of the women who do find employment, they are more likely than men to work in precarious positions (SPCO, 2008(b)), which are characterized by a “high risk of termination, limited benefits, irregular work-shifts and low income” (SPCO, 2009(b), p.8). In 2006, 60.6% of part-year/part-time workers in Ottawa were women (SPCO 2009(b), p.8). For many women, working in these types of positions is an “involuntary decision, often taken out of a necessity to care for their families” (SPCO, 2009(b), p.8).

In 2005, the average employment income for women was 69.9% of the average employment income for men, indicating gender income-stratification in the work place (SPCO, 2008(b), p.86). Women also have substantially lower overall income levels than men. In 2005 “the median income for women was \$27,627, only 69% of the median income of men at \$40,383”, and the average income for women was only 67% that of the

average income for men (\$35,325 vs. \$52,527 respectively) (SPCO, 2008(b), p.91).

Immigrant women are also at an increased disadvantage in Ottawa's labour market, and are over-represented in traditional female occupations, precarious part-time jobs and are in one of the lowest median employment income ranges in Ottawa (SPCO, 2009(a)).

In conclusion, women, in terms of economic indicators, are at a much greater disadvantage than men. They face barriers to accessing gainful employment within the labour market itself, and also struggle with issues such as balancing family and work responsibilities. It is not surprising, therefore, that women are also much more likely to use community services than men, as they face greater levels of economic and social exclusion (SPCO, 2001(a)).

4.3.2 Children and Youth

In Ottawa the "persistence of high levels of poverty among children and youth is a very concerning problem" (SPCO, 2008(b), p.10). High levels of child and youth poverty "are major barriers to the healthy development of children" (Rothman, 2007, p. 661), including but not limited to their health, access to services, access to education and access to recreation opportunities. For example, children and youth who experience social exclusion and require supports are also found to struggle with issues related to "depression, anxiety, abuse, assault, persistent bullying, homelessness, violent behaviour, anger, substance abuse, and suicidal thoughts and/or attempts" (Community Foundation of Ottawa, 2009, p.6). Although a number of programs are available to help children, "a number of service gaps continue" to exist (City of Ottawa, 2003, p.30).

In 1996, the child poverty rate for children aged 0-14 in Ottawa was 19% (City of Ottawa, 2003, p.28), and by 2005 almost “one in five children and youth in Ottawa lived on low income” (SPCO, 2008(b), p.10). Intersectionally, child poverty rates are also disproportionately higher amongst certain demographic groups, including those from Aboriginal, immigrant, visible minority, or disabled backgrounds (Campaign 2000, 2008; CCSD, 2003; Rothman, 2007; SPCO, 2007(a); SPCO, 2008(b); SPCO, 2009(a)). For example;

- more Aboriginal children live in poverty than those that are non-Aboriginal, particularly when that child is with a lone-parent (CCSD, 2003);
- immigrant children and youth face disproportionate levels of low income than the general population, with the proportion of immigrant and recent immigrant children living on low income after tax (43.7% and 44.0% respectively), being much higher than that for children in the general population (16.8%) (SPCO, 2009(a), p.28). In addition, “39.8% of immigrant youth aged 15-24 lived below income in 2005 compared to 23.7% in the general population” (SPCO, 2009(a), p.28)
- 25% of children under 6 with disabilities lived on low income before tax, which is only reduced by 2% after tax, reflecting a higher risk for low income children who have disabilities compared to children in the general population (SPCO, 2008(b), p.73). The parents of children with disabilities also face great challenges, such that their caregiving responsibilities for disabled children affects their labour market participation (SPCO, 2008(b), p.73);

Child and youth poverty is multidimensional and results from a number of interconnected variables including, amongst others, living in low-income familial environments, lack of available quality child care, inadequate housing facilities, inadequate health care, inadequate supports, and barriers to positive education experiences (Hertzman, 2002). A few of these factors are discussed below.

The incidence of child poverty is directly linked to a family's structure and socio-economic status, as this affects their access to socially inclusive environments, including developmental opportunities and positive learning environments (Hertzman, 2002). For example, lone-parent families are much more likely to experience difficulties in balancing expenses, and "to experience significantly higher rates of low income compared to all families and couple families" (SPCO, 2008(b), p.10). In terms of Ottawa's family composition over the period of 1996-2006, the number of lone-parent families grew faster than the national average and at nearly twice the rate of married couples (SPCO, 2008(b)). In 2006 one in four families was led by a single parent (SPCO, 2009(b)), with this number growing most rapidly for lone-parent families headed by women which increased by 38.3%, more than double the growth rate of lone-parent families headed by men (SPCO, 2008(b), p.29). As a result, in 2006, "more than one in five children lived in lone-parent families in Ottawa, most of them in female-lead [*sic*] households (83%)" (SPCO, 2009(b), p.7).

Since, as stated above, women lag behind men in terms of labour market and income indicators, female lone-parent families live significantly below the average income level of male lone-parent families (SPCO, 2008(b)). Female single-parents are also "characterized by the combination of low-income and larger families with young

children, resulting in a higher risk of poverty” (SPCO, 2009(b), p.7). As a result, there is a “recognition that households headed by female single parents are likely to be poor” (Byrne, 2005, p.99). Further, female parents in lone-parent families are “more likely than other workers to enter and exit the labour market...[which] can limit earnings, reduce access to professional development opportunities and career advancement, and may hinder a female parent’s eligibility for Employment Insurance” (SPCO, 2005, p.18). The unpaid caregiving work provided by female lone-parents is also of special concern as their lower incomes prevent them from hiring child care (SPCO, 2009(b)). A child who lives in a low-income single-parent family, particularly those that are female lone-parent families, therefore, has less access to a socially inclusive environment.

Contributing to the high poverty levels of children, particularly those in lone-parent families headed by women, are high housing costs, and lack of affordable housing (SPCO, 2008(b)). Among low-income families with children, 66% live in unaffordable housing, defined as shelter costs that exceed 30% of total income (SPCO, 2008(b)). Lone-parent families are also the “fastest growing group of users of emergency housing (shelters and hostels)” (Rothman, 2007, p.663), with approximately three-quarters of adults with children using homelessness facilities and shelters being single mothers (Social Sciences and Humanities Research Council of Canada [SSHRC], 2008).

Many children who are living in poverty also “live in families who must rely on welfare incomes (provincial social assistance and other benefits combined with federal benefits and tax credits)” (Rothman, 2007, p.663). While welfare supports exist for families, they have been “seriously eroded in most parts of the country over the past decade, and in no province or territory do welfare incomes for families approach the

poverty line” (Rothman, 2007, p.663). Further, while various supports exist for children in low-income families, for example the Canadian Child Tax Benefit (CCTB) and other childcare supplements and/or tax credits, they are too low to cover the costs of raising a child in Canada (Campaign 2000, 2008).

Such supplements, as mentioned above, also do not address the “critical shortage of subsidized, licensed and high quality care” in Ottawa (SPCO, 2005, p.32). Labour market indicators revealed a “very high labour market participation rate among those with children at home compared to the general population...[which] highlights the critical need for a good policy and program framework around working parents, including access to licensed quality childcare” (SPCO, 2008(b), p.9). While there has been a significant decrease in the number of children on the waiting list for child care spaces, in 2008 there were still 6,895 children on the waiting list (Community Foundation of Ottawa, 2009, p.10). Further, while there has been a significant decrease in the number of children on the waiting list for subsidized childcare, there were still “2,100 children on the waiting list in 2008” (Community Foundation of Ottawa, 2009, p.10). In addition, on average there are “more hours of unpaid childcare provided by the immigrant population, compared to the general population” which is reflective of a “lack of access to affordable and culturally sensitive child care” (SPCO, 2009(a), p.16). Overall, “with the exception of Quebec, there has been little done to expand Canada’s childcare system to meet the needs of the increasing number of working mothers” (SPCO, 2009(b), p.8).

Barriers in the education system in Ottawa also impact upon the social exclusion of immigrant and visible minority families and children, which include a lack of information on how the Canadian school system works; barriers related to school fees;

lack of successful integration of newcomers; concerns surrounding the quality of the curriculum, concern about the Canadian values being endorsed as opposed to traditionally held beliefs; the active discouragement of some students, discrimination and stereotyping; and the under-representation of visible, ethnic and religious minorities in the system and decision making process (SPCO, 2008(a)).

Overall, children and youth, particularly those from intersectional backgrounds and those from female led lone-parent families, experience very high levels of social exclusion. A strategy to combat child poverty, in Ottawa therefore, must include:

“good jobs at living wages that ensure that full-time work is a pathway out of poverty; an effective child benefit...that is indexed; a system of affordable, universally accessible early learning and child care services available to all families irrespective of employment status; an affordable housing program that creates more affordable housing and helps to sustain existing stock; and affordable and accessible postsecondary education and training programs that prepare youth and adults for employment leading to economic independence” (Rothman, 2007, p.661).

4.3.3 Immigrants³ & Visible/Ethnic Minorities⁴

Immigration is quickly becoming the “driving force behind population growth in the City of Ottawa, as Canada and Ottawa face a zero population growth rate” (SPCO, 2009(a), p.6). Between 2001 and 2006, 78.9% of Ottawa’s population increase was due to immigrant settlement (SPCO, 2008(b), p.12). In 2006, there were 178,545 immigrants living in Ottawa, which represented almost one quarter of the population (22.2%) (SPCO, 2008(b), p.7). Of those, 17% were recent immigrants who arrived in Ottawa between

³ Immigrants, according to SPCO (2008(c)), are “people who have been granted the right to live in Canada permanently by immigration authorities” (p.55)

⁴ Visible minorities are defined as “persons, other, than Aboriginal peoples, who are non-Caucasian in race or non-white in colour” (SPCO, 2008(a), p.26). It is herein acknowledged that the term ‘visible’ minority is an inherently exclusionary term, which by its very nature, arbitrarily groups and ‘others’ individuals, into artificial socially constructed categories of non-white or non-Aboriginal (SPCO, 2008(a)).

2001 and 2006 (SPCO, 2008(b), p.57). In recent years, Ottawa has also become increasingly diverse and multicultural as there “has been a significant change in the main source countries of immigration to Canada”, from primarily European countries to those of the Middle East and Africa (SPCO, 2008(b), p.7). While remembering that not all visible minority persons are immigrants, nor are all immigrants visible minorities, in 2006, “57.8% of immigrants (103,135) self-identified as visible minorities, [and] 75.1% (22,275) of recent immigrants who arrived during the period 2001-2006 self-identified as visible minorities” (SPCO, 2009(a), p.8)

The majority (52%) of the immigrant population are women, which is reflective of the general gender dynamics in the City (SPCO, 2008(b), p.60). Further, demographic trends indicate that the immigrant population group is becoming “younger and [more] prominent in the working age group” (SPCO, 2008(b), p.7). Immigrant families also tend to have more children on average, with the immigrant child and youth population representing a growing proportion of Ottawa’s total child and youth population (SPCO, 2009(a)). Due to the increase in immigration, Ottawa’s senior and disabled populations are also quickly becoming more diverse, with 30.9% of Ottawa’s senior population in 2006 being immigrants (SPCO, 2009(a), p.12). 25% of those with disabilities in 2006 were also immigrants (SPCO, 2008(b), p.72).

Ottawa also receives the “highest percentage of immigrants with a university degree among Canada’s largest cities” (SPCO, 2009(a), p.17-18). In 2006, 52.2% of working age immigrants and 64% of recent immigrants had a university education, compared to 44.6% of the general population (SPCO, 2009(a), p.17-18). Immigrants also bring a wealth of knowledge of additional languages to Ottawa (SPCO, 2009(a)).

Despite such qualifications and a greater prominence in the working age population, statistics show that immigrants are “falling behind in the labour market” (SPCO, 2008(b), p.9). The labour force participation rate for Ottawa’s immigrant population is lower than that of the general population (64.2% to 69.3% respectively), and the unemployment rate for immigrants over the age of 15 is also significantly higher (7.2% compared to 5.9%) (SPCO, 2009(a)). The groups being most affected by unemployment are recent immigrants, immigrant youth, female immigrants and university-educated immigrants (SPCO, 2009(a), p.20).

Immigrants in the labour market are more often found in low-skilled, precarious employment which is poorly matched to their work experience and credentials (SPCO, 2008(b); SPCO, 2009(a)). Many of these jobs tend to lead to unstable and insecure employment, including lower wages and minimal job security (SPCO, 2009(a)). Immigrant women, particularly recent female immigrants, are also at an increased disadvantage in the Ottawa labour market, as they are over-represented in traditionally female-associated occupations, precarious part-time employment, and are in one of the lowest median employment income ranges (SPCO, 2009(a)).

Immigrants in the workforce also earn less than the general population, with their median employment income (\$28,779) being substantially lower than that of the general population (\$34,343) (SPCO, 2009(a), p.24). In 2005, “immigrants earned the equivalent of \$0.83 for every \$1 earned by an employed person in the general population”, with recent immigrants faring even worse, earning less than half (\$0.43) of every dollar that general population does (SPCO, 2009(a), p.24). While visible minority immigrants fare a little better (in 2005 they earned \$0.70 per every \$1 in the general population), immigrant

women's earnings were significantly below those of men in the immigrant population, confirming an income gender gap in the City (SPCO, 2009(a)).

Census data also presents a “worrisome scenario of income inequalities affecting the economic inclusion of immigrants and thus the economic development of the City” (SPCO, 2009(a), p.25). In 2005 the median income before tax of immigrants 15 years and over was \$25,994, which was 21.3% below the median income of the general population of Ottawa (\$33,023), with the discrepancies increasing dramatically for those who are recent immigrants, visible minority immigrants and female immigrants (SPCO, 2009(a), p.26). There is also a “high concentration of immigrant population in low income groups, which is even higher among recent immigrants” (SPCO, 2009(a), p.26). “In 2005, 39.5% of total immigrants and 56.3% of recent immigrants had incomes below \$20,000, compared to 33.3% in the general population” (SPCO, 2009(a), p.26). Further, in 2005, the “the incidence of low income (LICO) after tax for recent immigrants was 37.0%, in relation to 18.1% for total immigrants and 12.3% for the general population of the City” (SPCO, 2009(a), p.28). Immigrant seniors also fare much worse as “6.9% of seniors in the general population lived on low income (below LICO after tax) compared to 8.9% of immigrant seniors”, with the incidence for recent immigrant seniors being over 25.0% (SPCO, 2009(a), p.28)

Although we must recognize that not all visible minority persons are immigrants, nor are all immigrants visible minorities, there is significant overlap between the two, demonstrated by the fact that in 2006, “one third (32.8%) of the visible minority population of Ottawa was composed of persons who are Canadian citizens by birth...Sixty-four percent were immigrants” (SPCO, 2008(b), p.64). In 2006 “one in five

(20%) of Ottawa residents belonged to a visible minority group”, and this population group is increasing at a rate that is four times faster than that of the general population (SPCO, 2008(b), p.7). The visible minority population is also significantly younger than the general population, with 41% of this population group in Ottawa being between the ages of 0-24, (as opposed to 12.4% in the general population). In addition, as of 2001, “visible minority residents in Ottawa [were] significantly more likely to hold a university degree than non visible minority residents (34.5% compared to 27.6%)”, however 20% of early school leavers (those who dropped out before completion) were visible minority residents in 2006 (SPCO, 2008(a), p.84)

While the labour force participation rate for visible minorities and non-visible minorities in 2001 was relatively close (67.6% vs. 70.7% respectively), visible minorities continue to “lag behind non visible minorities when it comes to labour market outcomes and earnings” (SPCO, 2007(b); SPCO, 2008(a)). At all occupational levels, it is found that there is a real “disadvantage for ‘other than white’ ethnic minorities as compared with ‘whites’ in their own occupational category”, indicating more difficulty accessing jobs in the labour market for visible minorities (Byrne, 2005, p.103). For example, the unemployment rate for the visible minority population (10.8%) was more than double that of the non visible minority population (4.8%) (SPCO, 2008(a), p.55). Further, visible minority citizens are “disproportionately found in lower end jobs, with low wages, poor working conditions and poor access to benefits such as health benefits and pensions” which has implications for short and long term financial stability (SPCO, 2008(a), p.58).

Data from the 2001 Census showed that the median income of visible minorities was only 62% of the median income of non visible minorities in Ottawa, and visible minority citizens were between four and six times more likely to experience low income compared to the general non visible minority population, with more than half of visible minorities living on less than \$20,000 and almost one third living in poverty (SPCO, 2007(b); SPCO, 2008(a)). As a result, visible minority individuals share an overwhelming sense of unfairness, lack of power, and frustration related to economic exclusion (SPCO, 2008(a)).

Immigrant populations, particularly recent immigrants, have “a crucial role to play”, in Ottawa, particularly due to their cultural and linguistic diversity and age demographics (SPCO, 2009(a), p.5). As such, economic growth is dependent on “success in the social and economic integration of immigrants and their families, particularly their children and youth” (SPCO, 2009(a), p.6). As we have seen, however, immigrants and visible minority populations in Ottawa, especially those that are recent immigrants and women, experience high levels of exclusion as a result of multiple social, economic and political barriers. These barriers include, amongst others; labour market barriers experienced by immigrants; labour market barriers experienced by ethnic and visible minorities; unique demographic and family structures of immigrant families; the racialization of economic exclusion in Ottawa; barriers to the education system; barriers to equitable and necessary housing; and barriers to civic engagement (SPCO, 2008(a); SPCO, 2009). Any strategy to address the exclusion of immigrant and visible minorities must address these multiple barriers to social inclusion that are faced by these groups in the City of Ottawa.

4.3.4 Aboriginal People⁵

In 2006, according to Census Canada, there were 13,485 people of Aboriginal identity living in Ottawa (with some reports placing the Aboriginal population closer to 20,590) (SPCO, 2008(b), p.47). Between 1996 and 2006, the Aboriginal population in Ottawa increased by 67%, six times faster than the growth of the non-Aboriginal population (SPCO, 2008(b), p.6). According to the 2006 Census, 39% of this population group in Ottawa is between the ages of 0-24, as opposed to 12.4% in the general population (SPCO, 2008(b), p.47-49). Women outnumber men in the Aboriginal population, and 2.2% of those who are disabled are of Aboriginal descent (SPCO, 2008(b), p.50, 71). Further, it was found that a “significant percentage of the Aboriginal population living in Ottawa has higher levels of education and knowledge of the two official languages” than the general population, however there is also a significant proportion of the Aboriginal population between the ages of 15-24 years who does not have a certificate, diploma or degree (SPCO, 2008(b), p.7).

Despite their achievements in terms of education and language skills, economic exclusion continues to affect the Aboriginal population. This population group tends to have higher rates of unemployment and lower median incomes in Ottawa (SPCO, 2008(b)). In 2006, the unemployment rate for the Aboriginal population was 9.2%, which was three points higher than that of the total general population (5.9%) (SPCO, 2008(b), p.54). Interestingly, the unemployment rate for Aboriginal men (9.8%) was higher than that for Aboriginal women (8.7%) which is opposite to the demographics for the general population (5.7% for men and 6.1% for women) (SPCO, 2008(b), p.54).

⁵ The Aboriginal identity population is comprised of those who identify as First Nation North American Indian (Algonquin, Mohawk, Ojibway, Mi'kmaw), Metis and Inuit (SPCO, 2007(a); SPCO, 2008(b)).

In 2005, the median income of the Aboriginal population aged 15 years and over in Ottawa was much lower than that of the total population (\$26,157 vs. \$33,024) (SPCO, 2008(b), p.54). As a result, it has been found that “Aboriginal people in urban areas were more than twice as likely to live in poverty as non-Aboriginal people”, particularly those who are Aboriginal children and those children who lived with lone-parents (CCSD, 2003). In Ottawa, it is known that poverty “among employed Aboriginal groups is high, with 24% of Aboriginals in the labour force being low income” (SPCO, 2005, p.6).

In addition to economic and labour related factors, there “continues to be increasing concern with respect to the large number of Aboriginal homeless people in urban centres in Canada” (Social Data Research Ltd., 2005, p.26). In Ottawa, Aboriginal people are over-represented in the number of people who are homeless, with 27% of the homeless population in Ottawa being Aboriginal in 2003 (City of Ottawa, 2003, p.30; SSHRC, 2008). In terms of agencies that serve homeless people, of those who are aboriginal users of services, 70% were Aboriginal men and 30% were Aboriginal women, however statistics show that the number of female Aboriginals accessing housing services is also on the rise, with the majority (88%) being single women and 12% being lone parents with at least one child (Social Data Research Ltd., 2005, p.3). Further, the Youth Services Bureau has reported that “about 6-7% of all youth clients in the Young Women’s Shelter, waiting for YSB housing or accessing downtown drop-in services are Aboriginal” (Social Data Research Ltd., 2005, p.4). Such Aboriginal youth have multiple needs including “basic needs such as shelter, food, and health care as well as more complex needs associated with substance abuse, lack of education, abuse, unemployment,

and relations with significant others. These youth often have concurrent disorders and are in poor health” (Social Data Research Ltd., 2005, p.4)

Aboriginal agencies have reported that there are many additional factors to the social exclusion of Aboriginal people, beyond economic ones, which are unique to Aboriginal people. These include, but are not limited to; high rates of substance, domestic and sexual abuses, high rates of mental illness, residential school-related trauma, loss of culture, loss of families, higher rates of Fetal Alcohol Syndrome, language identity, and dysfunctional families (Social Data Research Ltd., 2005). As a result, “the agenda of Aboriginal people living in urban centres must focus on more than these disadvantages. Issues of culture, recognition and identity, practices and institutions, having a voice that is heard and an opportunity to help shape the future city of Ottawa, are all significant for the Aboriginal population of Ottawa” (City of Ottawa, 2003, p.30). Many “urban Aboriginal people see their cultural identity as the core of their existence and they face major difficulties in dealing with non-Aboriginal agencies and institutions that have different values” (Social Data Research Ltd., 2005, p.28).

These statistics paint a picture of pervasive social exclusion for Aboriginal people, who experience “highly disadvantaged position[s]” in Ottawa (Juteau, 2003, p.16). Any initiative to combat the social exclusion of Aboriginal populations must seek to acknowledge the historical discrimination faced by Aboriginal peoples, as well as provide culturally sensitive supports unique to this demographic group.

4.3.5 Persons with Disabilities⁶

The number of those who are disabled in Ottawa is increasing (20.7% increase over 2001), and will continue to increase due to the aging population in the city (SPCO, 2008(b), p.68). In 2006, there were 149,425 people with a disability/activity limitation, representing close to one in five (18%) of Ottawa's residents (SPCO, 2008(b)). Due to the increase in the incidence of disability with age, there is a higher representation of seniors who have a disability in Ottawa, with one third of those who are disabled being 65 years or older (SPCO, 2008(b), p.8). In addition, women are more likely to have a disability than men, particularly in their senior years (SPCO, 2008(b), p.8). Further, persons with disabilities have an increasingly "diverse ethnicity reflecting the composition of the population of the City" (SPCO, 2008(b), p.8). In 2006, 25% of people with disabilities were immigrants, and 2.2% were of Aboriginal decent (SPCO, 2008(b), p.71-72). In terms of education, a lower percent of people with disabilities are attending full time education, and are less likely to attain education levels equivalent to those of the general population (SPCO, 2006).

There are significant barriers to social inclusion for those who are disabled, including barriers to "employment, housing, home care, recreation, health care and social services" which deny disabled people in Ottawa full participation in society (City of Ottawa, 2003, p.23). Most significantly, economic exclusion, housing issues, and social

⁶ Statistics Canada uses the term 'persons with an activity limitation' in place of the term 'disabled'. This thesis will use the terms interchangeably. According to Statistics Canada, an activity limitation refers to "any limitation on activity, restriction or participation or reduction in the quality or type of activities because of a physical, mental or health problem. Activity limitation includes difficulties in hearing, seeing, speech, walking, climbing stairs, bending, learning or any other difficulty in carrying out similar activities, and conditions or health problems that have lasted or are expected to last six months or more" (SPCO, 2008(b), p.68).

and physical barriers to participation in community life continue to be the primary factors contributing to the social exclusion disabled citizens in Ottawa.

The literature “is clear that people with disabilities face significant barriers securing employment” (SPCO, 2005, p.22), relating to discriminatory labour market policies and employment practices (SPCO, 2006, p.5). For example, although over half of those with disabilities in 2005 in Ottawa were within the working age groups of 25-64, the labour force participation rate was only 43%, which is significantly lower than that for the general population (69.6%) (Community Foundation of Ottawa, 2009, p.17; SPCO, 2008(b), p.8). Further, in 2005, people with disabilities experienced an unemployment rate of 7%, which was much higher than that of the general population (5.8%) (SPCO, 2008(b), p.73). For those who do find work, disabled persons are much more likely to be employed on a temporary or part-time basis, explained by requirements of disability benefit schemes, employer discrimination and the need for work flexibility of the disabled employee (Shur, 2003; SPCO, 2006; Priest et al., 2008).

When compared to the general population, people with disabilities also have lower incomes on average (SPCO, 2006). Due to the lack of access or inability to work, less than one half of those with disabilities get their income from working (47.4% compared to 78.3% for the general population) and over one in five people with disabilities get their income from government transfers (SPCO, 2006, p.4). Even with supplements and government transfers, in 2005, the average income for those with disabilities from all sources was \$35,923, which was down by \$453 from the previous census period, and representative of only 82.7% of the average income from all sources

for the general population (\$43,441) (SPCO, 2008(b), p.73). These rates further decline significantly for women who are disabled in the workforce (SPCO, 2006).

As a result of labour market and income discrepancies, low income “is a ‘core issue’ that impacts upon many aspects of inclusion in community life for a significant percent of people with disabilities” (SPCO, 2006, p.5). In 2005, “more than one in five individuals with a disability lived on a low income before tax”, and 3.4% of those with disabilities had no income at all (SPCO, 2008(b), p.72-73). While tax benefits curb some of the difference, the incidence for low-income after tax for those with disabilities was still 17% (SPCO, 2008(b), p.72). Among those with low incomes, 25% of children under 6 with disabilities lived on low income before tax, which is only reduced by 2% after tax (SPCO, 2008(b), p.8), reflecting a higher risk of low income for children who have disabilities compared to children in the general population (SPCO, 2008(b), p.73)

Current disability policies tend to focus on those who are actively able to participate in the labour market, but “rigidities in income support programs for people with disabilities make it difficult for those who can work to make the transition to employment” (Ontario Association of Food Banks [OAFB], 2008, p.9). In particular, while ODSP rates are higher than Ontario works, they remain inadequate and rife with systematic barriers to inclusion for those with disabilities (SPCO, 2001(b)). Further, there are unique barriers to those who are disabled that may only allow them to participate on a part-time basis, or to not participate at all, which is difficult to align with a system that focuses on employment first. While Ontario has made strides to expand its supports to those who are disabled, such as the inclusion of a monthly transportation allowance, addressing barriers to the access to employment for the disabled, and

providing ongoing additional benefits to those individuals who leave the primary income support systems (Priest et al., 2008), disabled persons continue to have significantly lower participation rates in the labour market, as well as lower average hours of work, higher rates of precarious and part-time employment, and lower average earnings overall (Hum & Simpson, 1996).

Given the high rate of low income among people with disabilities, another critical issue for persons with disabilities is housing. Those with disabilities “face numerous challenges in accessing housing appropriate to their needs”, due to factors such as inclusion, accessibility, affordability, availability, safety and quality (SPCO, 2006, p.5). Many people with disabilities are not able to secure housing that is suitable to their particular needs either because it is not accessible, or it is unavailable, which impacts upon their safety and quality of life (SPCO, 2006).

Barriers to participating and contributing to community life are also significant in the lives of those with disabilities in Ottawa (SPCO, 2004, p.5). Barriers for persons with disabilities are not only social and economic but also physical, attitudinal and structural (Echenberg, 2000). Of major concern for those with disabilities are; concerns of access to preventative health barriers due to accessibility, lack of information and discriminatory attitudes; concerns of social isolation seeing that the percentage of those with disabilities who live alone is twice that of the general population; barriers to general participation which include accessibility, costs, inadequate information, transportation issues, and exclusion by staff or participants; and lastly concerns surrounding their general access to services due to cut-backs, lack of coordination, poor services and constant barriers that are physical, social and economic in nature (SPCO, 2006).

Given that the disabled population of Ottawa represents unique challenges and needs, and in order to grant them full inclusion, changes need to be made to recognize their unique needs socially, economically and physically (Echenberg, 2000; Priest et al., 2008).

4.3.6 Seniors

While residents in Ottawa are typically younger on average than in Canada as a whole, demographic trends indicate that the city of Ottawa has a rapidly aging population, influenced by the decline in post-baby boom fertility rates, longer rates of longevity, and a declining child and youth population (Community Foundation of Ottawa, 2009; SPCO, 2008(b)). In 2006, “the population 65 years and over accounted for 12.4% of Ottawa’s population, up from 11.1% in 1996” (SPCO, 2008(b), p.21). Further, women outnumber men in the senior populations (SPCO, 2008(b), p.21), and the senior population is growing increasingly diverse in terms of race and immigration status (Council on Aging of Ottawa [CAO], 2008, p.4). This reflects unique needs for the increasingly dynamic senior population, as the “specific needs and services required by younger and older seniors call for different approaches from service providers that are culturally and age appropriate” (SPCO, 2009(a), p.13). Despite their growing presence in the community of Ottawa, however, there are many factors contributing to the social exclusion of seniors in Ottawa today, most importantly being those related to economic exclusion, social isolation, and housing.

The financial situation of seniors in Ottawa is improving. The average income of seniors in Ottawa in 2006 was \$39,729 – among the highest in Ontario, and the median

income was \$30,022 (CAO, 2008, p.11). Despite these improvements, however, seniors continue to face difficult economic situations, in terms of lower income and higher poverty levels. For example, although seniors aged 65 years and over had a lower poverty rate than the general Ottawa population, according to the 2006 census, 6.9% of seniors in the general population, or almost 11,000 seniors, lived on low income after tax (SPCO, 2008(b), p.95; SPCO, 2009(a), p.28). Further, this situation worsens dramatically for intersectional seniors, particularly those who are women, visible minorities and immigrants (NACA, 2005). For example, in 2006, 21% of senior men compared to 43% of senior women had incomes less than \$20,000 (CAO, 2008, p.4). In addition, 8.9% of immigrant seniors lived on low income after tax, with the incidence for recent immigrant seniors being over 25.0% (SPCO, 2009(a), p.28). Such financial insecurities bring with them a plethora of other issues, including housing instability, inability to afford retirement homes, and a fear of loss of independence in being admitted to long-term care facilities (City of Ottawa, 2003; UW/CO, 2007, p.8).

There is a common perception, due to the relatively stable financial well-being of seniors in Ottawa, that they require little assistance with their housing (CAO, 2008, p.8), however the housing situation of seniors is quite complex. While there are a number of housing choices available for seniors, they face housing challenges which are compounded by “a limited supply of [affordable] rental apartments, significant increases in house prices and property taxes, few supportive housing services, unregulated retirement residences, a restricted supply of social housing, the inadequacy of shelter accommodation and a lack of alternative housing for seniors with special needs” (CAO, 2008, p.8). Further, there is also an “insufficient supply of [affordable] housing to

respond to the different needs of seniors as they age” (CAO, 2008, p.8). Retirement residences are pricey, and the cost of paying for them is beyond the means of the majority of seniors.

The number of seniors living alone is increasing, as the vast majority of seniors are choosing to age at home as opposed to being institutionalized (CAO, 2008; SPCO, 2004; UW/CO, 2007). In 2006, 27.4% of the senior population was living alone at home, with female seniors aged 65 years being the majority (76%) of those who were single and living alone (SPCO, 2008(b), p.25). Seniors who can afford to age at home are affected by a series of factors that contribute to their social exclusion, including the risk of social isolation and a lack of available supports. There is the need for additional supports for aging-in-place by which to ensure their safety and security and to reduce the chances of social isolation and exclusion (CAO, 2008; SPCO, 2004; UW/CO, 2007). According to Successful Aging Ottawa Seniors Survey of seniors living in Ottawa in 2004:

“23% of seniors in Ottawa need help with activities of daily living (preparing meals, shopping for groceries, everyday housework, heavy chores, personal care and moving about). While most seniors report getting the help they need, 6% of those who need help with one or more activities of daily living say they are not receiving any help. This percentage increases to 15% for seniors living in households with an income of less than \$20,000” (UW/CO, 2007, p.9).

Responses to the social exclusion of seniors in Ottawa must, therefore, incorporate the need for affordable and supportive housing for seniors, as reflective of “any kind of housing and support arrangement that covers the gaps between housing for completely independent seniors and those living in long-term care” (UW/CO, 2007, p.9).

4.4 Effects of the Current Socio-Demographic Status of Ottawa on the Local Nonprofit Sector

As mentioned in chapter two, welfare state restructuring has significantly increased the roles and responsibilities on the local nonprofit sector, including Ottawa. In addition, however, welfare state restructuring paired with the current economic downturn in Ottawa, has also further increased the levels of reliance and demand placed on the nonprofit sector in a way not experienced in the past, significantly affecting the ability of funders and agencies to fulfill demand of socially excluded communities. Due to an increasingly unstable and insecure economic environment in Ottawa, citizens are facing “complex and multi-dimensional issues”, while agencies strain to respond accordingly (UW/CO, 2009, p.3).

Studies conducted by the United Way/Centraide Ottawa (2009) and the Social Planning Council of Ontario (2009), both found that demand for local agencies in Ontario, and Ottawa, have significantly increased over all demographic groups in need, including those who have not required services in the past, as they struggle to meet their basic needs. The greatest increase in demand has also come from particular socio-demographic groups, including children and youth, new Canadians and immigrants, persons with mental health issues and women (UW/CO, 2009). Rather than signalling a new trend, however, the “current economic situation is exacerbating a pre-existing problem faced by cash-strapped community service agencies trying to meet growing community needs with inadequate resources” (SPNO, 2009, p.3). Many feel the need to resort measures such as supporting this increased need with the same staffing levels, applying for increased levels for funding, increasing fundraising efforts, and recruiting additional volunteers (SPNO, 2009). Agencies have also increased the request for funding

support from funders and grant-makers, which are also facing pressures due to the increased demand and diminished resources (UW/CO, 2009). Others, however, feel the need to respond in unique and innovative ways, including adapting to partnership models with other community organizations, sharing resources and space, and collaborating on initiatives (UW/CO, 2009). Despite agencies pulling all stops necessary to meet the demands, however, it is “simply not enough” (SPNO, 2009, p.3) as agencies face high levels of uncertainty due to increased burdens of funding cuts, increasing needs, overloaded staff and organizational dysfunction (SPNO, 2009).

4.5 Conclusion

This chapter has provided a socio-demographic snapshot of the community of Ottawa. Following a brief introduction to how Canadian welfare state rescaling has affected the economic situation and labour market in the community of Ottawa, this chapter has identified the particular population groups who are those most in need in the city of Ottawa, the socially excluded. These population groups were identified as women, children and youth, immigrants, visible minorities, Aboriginal peoples, disabled peoples, and seniors. As a result of not only changing social welfare structures and decreased supports, but also due to historically held patterns of inequality embedded within citizenship structures which are acted out through gendered, biased and racialized social welfare policy, this is the current situation in the city of Ottawa. We have also seen, from this chapter and chapter three, that the needs of groups who experience social exclusion are multidimensional, complex and intersectional. In order to effectively

combat social exclusion, therefore, responses must address both the processes and outcomes of social exclusion.

As needs grow within these socially excluded populations, these are the groups which Ottawa nonprofit organizations are called upon to assist, albeit within a time when agencies and funders have acquired increased roles and responsibilities with fewer resources. Community agencies, therefore, are finding it increasingly difficult to service the needs of their clients, as their needs become more complex and grow, while agencies experience staff and volunteer fatigue, reduced resource capacity, and instability (UW/CO, 2009). Nonprofit public foundations, further, have also seen an increased call for supports from such agencies, but in light of welfare state rescaling and increased demands and needs, public foundations have also needed to readjust and focus their investments.

Having now discussed how the shifting and rescaling Canadian social welfare state has created spaces for the nonprofit sector at the local scale, and what types of needs and population groups are in the greatest demand for services and supports in the community of Ottawa, we are now in a better position to analyze the roles of the United Way/Centraide Ottawa in addressing social exclusion in the social welfare diamond of Ottawa.

CHAPTER 5 – The United Way/Centraide Ottawa’s Roles in Tackling Social Exclusion in Ottawa

5.1 Introduction

While the United Way/Centraide Ottawa has a long history of working to tackle social exclusion, decentralization combined with increased levels of social exclusion have led to a rise in the demand for funding from the organization. As a result, the United Way/Centraide Ottawa has found itself needing to refocus its work. In attempting to meet these new challenges, the organization’s approach has shifted to investments in agencies that address systematic root causes of social exclusion.

This chapter will examine the United Way/Centraide Ottawa’s contribution to tackling social exclusion in the community of Ottawa. The chapter begins with a look at how the organization has restructured in response to welfare state reform, increased demands for funding, and growing demands from donors for investment accountability. This will be followed by a look at how the organization has sought to address social exclusion more effectively in recent years. While these initiatives represent a step in the right direction, the organization also faces a number of challenges – a point to be addressed in the next section of this chapter. This section will also include suggestions for improvement in United Way/Centraide Ottawa’s contributions to tackling social exclusion.

5.2 United Way/Centraide Ottawa’s response to multiscalar shifts in the Canadian Social Welfare State

To understand United Way/Centraide Ottawa’s place in the local social welfare diamond, we must first look at how the organization has responded to multiscalar shifts

in the allocation of responsibility of social welfare and to deepening levels of social exclusion in Ottawa. While the United Way/Centraide Ottawa has always been a public foundation, its roles have changed over time in response to a changing societal and political environment.

The United Way/Centraide Ottawa has a long history of involvement in the community of Ottawa. Until the 1930s, there was little national state presence in the provision of social welfare, as churches and charities were seen as the primary provider of social supports. As a result, the United Way/Centraide Ottawa (then known as the Ottawa Community Chests), played a major role in the community. Established in 1933 as a federated fundraiser, the organization assumed the role of a charitable public foundation, raising funds for a number of local service agencies. These funds were then passed on to member agencies; however there was no real rationale for deciding which agencies would receive funding (M. Allen, personal communication, February 10, 2010).

Although the Canadian government began to provide some social services for Canadians in the 1940s, including Unemployment Insurance and Family Allowances, this did not obliterate the role of local voluntary organizations. During this time Ottawa was a growing city in which social welfare issues were attended to by both the municipality and a cohort of nonprofit charitable organizations. Although Ottawa's economy prospered during this period, demands for assistance increased due to a growing and increasingly diverse population. Working through organizations such as the Welfare Council of Ottawa, city planning focused on social issues such as housing, homecare, single mothers, disabilities, seniors and poverty (UW/CO, 2010, Our History). United Way/Centraide Ottawa played an important role during this time, by funding local

agencies so that they could provide support services to meet new needs. It also sought to strengthen its partnerships within the community, and by 1947, United Way/Centraide Ottawa joined forces with other Community Chest organizations across Canada and the United States, adopting a new campaign logo, the 'red feather', which symbolized voluntary giving and community-building.

In the late 1950s, the city of Ottawa's welfare program was enhanced to respond to growing levels of unemployment and poverty. Prompted by the recession and rising levels of need, the United Way/Centraide Ottawa sought to develop a more systematic way of meeting the growing demand from agencies. It adopted a "rating system for new or expanding programs by member agencies", and regularly reviewed agency programs (UW/CO, 2010, Our History). In collaboration with other organizations, it also helped to establish the Youth Services Bureau, as problems faced by youth crime came to the fore (UW/CO, 2010, Our History).

During the prosperous 1960s and 1970s, the federal and provincial governments began to contribute substantial financial support for a growing array of social services. This transformation in federal and provincial responsibility led to a rapid expansion of social service expenditures in the City of Ottawa. By the mid 1960s, there were 163 private and public agencies, spending over \$62 million to deliver public social service programs in Ottawa (UW/CO, 2010, Our History). As a result, the city became relatively stable until the 1970s, with an acceptable average family income and low unemployment rate. In response to shifting demographics, government funding to support agencies, both public and private, increased. This resulted in an expansion of social services to respond to new needs and demands. Due to the increase in municipally provided supports,

however, agency demand for financial support from the United Way/Centraide Ottawa diminished, and the United Way/Centraide Ottawa found itself with less of a role to play. To realign its focus, during the 1970s, the United Way/Centraide Ottawa opened discussions with the local Social Planning Council of Ottawa, which was becoming involved in community outreach programs, research and community development initiatives, to determine its role in the community (UW/CO, 2010, Our History).

The fiscal crisis of the 1980s and 1990s, however, resulted in the municipal government of Ottawa facing increased responsibilities for social assistance delivery and administration (Herd, 2002). To manage the increasing pressures, Ottawa sought to lower social welfare standards and tighten the eligibility criteria for social services, including placing contingencies on funding associated with compliance to Ontario Works objectives (as discussed in earlier chapters). Such changes resulted in a renewed reliance on the nonprofit sector, albeit, paired with diminishing levels of public financial support. As community nonprofit responsibilities grew exponentially, the United Way/Centraide Ottawa found itself faced with a heavy influx of funding and investment requests. Its capacity to meet these requests, however, was diminishing, as campaign dollars had begun to flatline in the 1990s. At the same time, donors also began to increasingly call for increased accountability from the organization for their investments (M. Allen, personal communication, February 10, 2010). Thus, in 1997 the organization began to shift from being a federated fundraiser to becoming an ‘impact’ driven organization. With the intention of making investments that sought measurable responses to social problems in the community, the organization defined a number of priority areas to guide investment in programs, projects and partnerships. Further organizational introspection

indicated, however, that the goals were found to be too reactive in nature, and too broad in scope. By 1999 United Way/Centraide Ottawa, therefore, introduced its new promise to “invest resources where they are needed the most and where they will have the greatest impact” (UW/CO, 2010, About Us). To achieve this, the organization sought a strategic approach, focused on building stronger communities and generating long-term change. The new plan involved four key areas: influencing public attitudes, systems and policy; focusing on underlying causes; strengthening the networks of services and capacity of non-profit organizations and community; and engaging the community through dollars, influence, time and knowledge (UW/CO, 2010, Our History). In addition, the organization worked to enhance its relationships with other members of the community, in collaborative and partnership efforts. Such initiatives sought to deal with community-wide issues by bringing a multitude of players to the table to find holistic responses.

Between 2001 and 2004, the United Way/Centraide Ottawa again reevaluated its priority areas. In 2003 the organization conducted an environmental scan which provided a snapshot of the current and emerging socio-economic and socio-demographic trends (K. Diguer, personal communication, January 13, 2010). Through this, it identified the population groups that it felt were most in need in Ottawa. The six impact areas identified included; promoting healthy development for children and youth; reducing isolation and enhancing the quality of life for seniors; reducing barriers and increasing participation for people with disabilities; strengthening individuals and families in times of need and crisis; reducing barriers and increasing engagement for New Canadians and Immigrants; and strengthening agency, neighbourhood and community capacity. Aboriginal people also constituted a seventh special initiative area.

Between 2004 and 2006 the United Way/Centraide Ottawa sought to align its impact work with community-level outcomes and indicators (UW/CO, 2010, Our History). In doing so it engaged the help of volunteer-led impact councils, which included members of the community, business world, and various scales of government, to identify community-level outcomes that would guide the organization's funding investments (H. Agha, personal communication, January 20, 2010). The first impact plans developed between 2006 and 2009, reflected these designated impact areas, and were intended to guide investment decisions (See Table 6.1).

Table 5.1 United Way/Centraide Ottawa Impact Area Plans Circa ~ 2006 – 2009.

Impact Area	Outcomes
Promoting healthy development for Children and Youth	<ol style="list-style-type: none"> 1. Increased positive social skills, self-esteem and confidence 2. Increased engagement in school and learning 3. Improved parenting knowledge, resources and skills 4. Increased healthy behaviour for children and youth at risk
Reducing barriers and increasing participation for People with Disabilities	<ol style="list-style-type: none"> 1. Increased autonomy and improved quality of life 2. Increased participation in recreational, social, cultural and daily activities 3. Increased community awareness and sensitivity to disability issues
Reducing barriers and increasing engagement for New Canadians and Immigrants	<ol style="list-style-type: none"> 1. Improved participation in all aspects of the community, including labour force, volunteerism and civic engagement 2. Increased community awareness of the challenges faced and contributions made by immigrants 3. Improved inclusion and integration in the community
Reducing isolation and enhancing the quality of life for Seniors	<ol style="list-style-type: none"> 1. Increased autonomy and independent living 2. Seniors, families and/or caregivers having access to effective supports 3. Increased participation in recreational, social, cultural and daily activities
Strengthening Individuals and Families in times of need and crisis	<ol style="list-style-type: none"> 1. Individuals/families have sufficient supports and/or resources to maintain or regain stability in their lives 2. Increased effective support and interventions for people experiencing crisis

	3. Increased effective support and increased safety for victims of violence, especially women and children 4. Homeless individuals or those at risk have effective supports to gain or maintain stable housing
Strengthening Agency, Neighbourhood and Community Capacity	1. Increased volunteerism and civic engagement in community 2. Increased capacity of agencies and neighbourhoods to recognize and respond to their changing community needs 3. Community members have access to information and resources regarding community services and issues
Source: United Way/Centraide Ottawa. (2008). <i>Community Investment Directory 2008</i> . Ottawa, ON: United Way/Centraide Ottawa.	

The United Way/Centraide Ottawa invested in agencies, programs and community-wide initiatives using this approach, moving away from general ‘mission support’ of agencies. Instead, it asked front-line agencies to show how their programs would help to achieve the desired outcomes, and various tools were to be used to measure success against these outcomes (P. Austen, personal communication, January 27, 2010). The United Way/Centraide Ottawa thus sought to make a measurable difference by investing in services and projects of local agencies in alliance with its community-level outcome goals. While some member agencies experienced some frustration about being asked to align their programming with the United Way/Centraide Ottawa’s priorities, the organization stressed that these changes were implemented with a focus on long-term and measurable outcomes for community betterment (I. Tupitsyn, personal communication, January 8, 2010).

Despite advancements made in the impact areas, the growth of successful community-wide initiatives, an increase in donor dollars, and a substantial increase in the amount of money being re-invested in the community, the United Way/Centraide Ottawa did not feel that demonstrable change was being achieved (J.P. Thompson, personal

communication, January 29, 2010). Donors were also increasingly calling for a greater understanding about how their investments were having an impact. The new strategy was thus not fulfilling its original intent, and it was decided that further changes needed to be made. Rather than being interpreted as a loss, however, these previous efforts were seen as a

“transition vehicle for [the United Way/Centraide Ottawa] to go from a federated fundraiser to an impact oriented United Way. They gave us a chance to take a look at our community and determine where we should focus our efforts. They helped us build a foundation of knowledge and expertise through which we may now move forward and focus our energies further” (M. Allen, personal communication, February 10, 2010).

In 2009 the United Way/Centraide Ottawa undertook the next phase in its impact-driven transition. The organization shifted focus towards the future and looked to how it needed to restructure its investment patterns. Following community and organizational consultations, the organization realized that in the formation of the previous impact areas they had, “accidentally, although with the best intentions, chopped individuals up and placed them into silos; immigrants, seniors, disabled, children, and so on. The problem, we realized, was that individuals could encompass elements of more than just one of those impact areas” (P. Austen, personal communication, January 27, 2010).

The United Way/Centraide Ottawa now felt that in order to achieve measurable, demonstrable and meaningful community change, it needed to focus on systematic problems and issues rather than groups (C. Gagnon, personal communication, February 26, 2010). To tackle the problem of segmentation, therefore, the organization shifted from demographically-based impact areas, to ‘strategic priority community issues’ where the organization felt it could best enact change. “The test we used was to identify not

only where the greatest need was, but why that need was there, and to identify where we could have the greatest impact. Both of these axes must be present for us to properly frame our work” (M. Allen, personal communication, February 10, 2010). In applying this test, the community priority issues identified were: building safe and vibrant neighbourhoods; supporting adolescents and their families in crisis; successful aging; eliminating barriers and increasing inclusion for immigrants and new Canadians; reducing homelessness in the community; eliminating barriers and increasing inclusion for people with disabilities; and supporting children and youth to meet their full potential. Such areas, while maintaining demographic elements, instead, looked to the root causes of issues.

The identification of these community priority issues resulted in the creation of measurable goal statements and strategies to align the organization’s efforts (I. Tupitsyn, personal communication, January 8, 2010). While this stage of the United Way/Centraide Ottawa’s transition was still in process at the time of research, and some community priority issue plans had yet to be finalized, as of early 2010, the structure looked as follows (See Table 6.2).

Table 5.2 United Way/Centraide Ottawa Community Priority Issue Plans 2009 – Present.

Priority Community Issue	Impact Initiative	Impact Strategy Goal Statement	Subcomponents	Target Population
Building Safe and Vibrant Neighbourhoods	Neighbourhood Social Capital	An increased number of residents are leading their own community development initiatives	Civic engagement, leadership and volunteerism	Priority Neighbourhoods
Support Adolescents and their Families in Crisis	Youth Addictions	Identify and intervene with youth experiencing problematic use of illicit drugs and alcohol	Early intervention and treatment	Adolescents
Successful Aging	Aging at Home	93% of people over the age of 65 will be able to live in their own homes by 2015	Access to supported community living (housing and community supports)	Vulnerable seniors

Eliminating Barriers and Increasing Inclusion for Immigrants and New Canadians	Employment and skills development for Immigrants and New Canadians	Decrease the 'underemployment' rate of Immigrants and New Canadians	Skill Development and Employer Engagement	Immigrants and New Canadians
Eliminating Barriers and Increasing Inclusion for People with Disabilities	Employment and skills development for Adults with Disabilities	Increase opportunities for meaningful employment for people with disabilities	Skill Development and Employer Engagement	Adults with Disabilities
Reducing Homelessness in the community	Housing first and Community supports	End chronic homelessness in Ottawa in 10 years	Housing First and Coordinated supports	Chronically homeless adults
Supporting Children and Youth to meet their full potential	Early Child outcomes	TBD	Physical health and well-being, emotional maturity, and language and literacy	Children in Low Income families

Source: United Way/Centraide Ottawa interview participants

Interview participants from the United Way/Centraide Ottawa also acknowledged that there was a need to keep the goals and subcomponents focused, yet broad enough to incorporate a number of different elements. For example, in regards to Successful Aging, the subcomponent identified was increasing 'access to supported community living', which could entail a wide variety of things, including, for example, increasing the number of affordable housing units, supporting programs that deliver necessary services to seniors living at home, such as meal delivery or transportation opportunities, and supporting programs that help to engage seniors who may otherwise remain in solitude in the home. For the community issue area of 'Supporting Children and Youth to meet their full potential', the responses could include programs and services that deal with proper nutrition, family supports and early literacy intervention. All of the priority community issue areas, impact initiatives, goals and subcomponents, therefore, cast a wide enough net to encourage a wide variety of responses, programs and services.

Beginning in late 2009/early 2010, the organization also began to investigate how it would align its investments to this structure. It hopes to make targeted investments in programs, agencies, partnerships and community-wide initiatives based on their alignment with these key priority community issues, goals and outcomes (P. Steeves, personal communication, January 8, 2010). For new funding opportunities, this will involve a move towards a request for proposals related to specific outcomes within a priority community issue area, rather than a generic open call for funding as done in the past (P. Austen, personal communication, January 27, 2010). The United Way/Centraide Ottawa will then review proposals to see if the program or agency can help to make a direct contribution to the targeted goal or outcome: “If agencies fit these qualifications, then they will receive funding, for they are assisting United Way/Centraide Ottawa in achieving its goals within the priority community issue areas” (K. Diguer, personal communication, January 13, 2010). By aligning investments to goals, United Way/Centraide Ottawa also hopes to help reduce the duplication of funding: “We want to consult across the sector in an effort to reduce that duplication. This shift is towards trying to achieve things together rather than through competition for funding or blind funding which can result in funding turf wars” (P. Austen, personal communication, January 27, 2010).

To ensure that investments in programs and agencies are contributing to outcomes and goals, United Way/Centraide Ottawa will also require measurable outcome results from the agencies and programs that it funds, hence shifting to results-based funding (M. Allen, personal communication, February 10, 2010). This requirement is part of a broader trend in increasing accountability and maximizing impact and returns on investments

(Morley, Vinson & Hatry, 2001), which has had a major influence on the process and restructuring happening at United Way/Centraide Ottawa.

“Our community and our donors want to see meaningful results. In order to understand if any type of movement is being made on community issues, research must be done and outcomes must be evaluated. Funding without this kind of outcomes analysis doesn’t tell us if our funding is actually making a difference. We want, and need, to see what movement is happening in relation to our goals when we fund agencies or programs. Getting results back from agencies and programs is critical to this process” (J. Highet, personal communication, January 21, 2010).

Rather than tracking data such as the number of clients served or the activities provided, the United Way/Centraide Ottawa will track its investments in relation to “the overarching goals and outcomes, and seeing what movement is being made in relation to them” (I. Tupitsyn, personal communication, January 8, 2010). Such measurements will be specific, targeted and focused on the community priority goals.

“We’re trying to get at the deeper issues, by focusing on and asking the right questions. We don’t want to ask questions anymore that just tell us statistics related to numbers in and numbers out. We want to see what long-term changes have happened, if cycles are being broken, if we’re looking at the right things to make change in our community” (M. Allen, personal communication, February 10, 2010).

For example, the Successful Aging community priority issue area goal statement, that indicates that the United Way/Centraide Ottawa aims to increase the number of seniors over the age of 65 who are able to live in their own homes by 2015, is quite direct in terms of measurements. The organization will track the number of seniors who are living on their own, and relate it back to the programs that they funded to indicate whether a difference was made or not. Another example is community priority issue area that looks at Reducing Homelessness in the community in which the United Way/Centraide Ottawa

aims to end chronic homelessness in Ottawa in a 10 year period. This goal statement, again, will direct the measurements of the organization with respect to this area.

Rather than looking at broad indicators associated with the outcomes from past impact areas, therefore, the new United Way/Centraide Ottawa strategy looks for specific measures of change that relate to the community priority issues (see Table 6.2), and will thereby fund according to such measurements and outcomes (S. Wilson, personal communication, January 21, 2010). The need for such measurements, however, also requires that funded agencies and programs report back on progress in relation to these goals and outcomes. When asked about the challenge of measuring ‘success’ and outcomes, although it was acknowledged that there has been difficulty in the past, “we have made great strides in terms of measurements. Through intense research we know what works and what we should be looking for in terms of measurements of change in Ottawa” (K. Diguier, personal communication, January 13, 2010). Further, while it is was acknowledged that some agencies may find it difficult to measure results or may have a reduced capacity to do so, “training will be offered in relation to outcome measurement, to ensure that agencies know what we are looking for in terms of their reporting back” (I. Tupitsyn, personal communication, January 8, 2010).

“Some agencies are nervous about the changes and measurements asked of them, which is understandable, however, following consultations with the community, we hope that they understand that such changes are needed to make all of us, including the agencies, accountable to the donors, ourselves, and the community at large. We are holding ourselves responsible for dealing with very large issues, and to ensure we are doing so, we need results” (P. Austen, personal communication, January 27, 2010).

The history of United Way/Centraide Ottawa's evolution described above suggests that "what was previously occurring was not working" (Anonymous Interview Participant⁷, personal communication, February 3, 2010). The changes that the United Way/Centraide Ottawa has undertaken have been in response to the challenges in the shifting social welfare community of Ottawa, and the increasing calls for accountability and impact by donors. These transitions over the past twenty years have led the organization beyond its previous role as a funder for a set number of member agencies. Instead, the organization has sought to focus its interests, share information, develop research, proactively set community priorities, address systemic issues, and increase collaboration with partners at all scales and within all sectors. While the new structure is not all-encompassing, it seeks to focus on issues that it knows it can have a substantial influence upon: "We are aligning our focus towards areas where we believe we can make a measurable difference" (M. Allen, personal communication, February 10, 2010).

While this organizational transition is still underway, the United Way/Centraide Ottawa continues to focus on strengthening partnerships and relationships with the other sectors of the welfare state diamond (including other funders and agencies within the nonprofit sector), increasing its capacity, effectiveness and efficiency, ensuring impact and measurement, and telling the story of their transition in a clearer fashion. With its continually adapting focus, increased revenues, new funding system, and growing partnerships, the United Way/Centraide Ottawa is working towards tackling and addressing the deeply rooted issues in the community of Ottawa.

⁷ The Carleton University Ethics Submission for this research project gave interview participants the opportunity to remain anonymous, and their answers to be unattributable, in order to encourage honest and forthcoming participation in the interview process. As a result, for those who chose this option, there are a number of references that will be identified as 'Anonymous' throughout this chapter of the thesis.

5.3 Tackling Social Exclusion: Roles of the United Way/Centraide Ottawa in the Social Welfare Diamond of Ottawa

The United Way/Centraide Ottawa, as a public foundation, has a long history of contributing to the battle against social exclusion in the social welfare diamond of Ottawa. By funding a variety of nonprofit agencies in the community of Ottawa, it has provided financial support to organizations so that they may fulfill their missions and support the socially excluded in the community of Ottawa. The transition described above, however, has altered the organization's purpose. This section investigates how this transition has restructured and redirected the organization's role in tackling social exclusion in Ottawa. Before discussing United Way/Centraide Ottawa's roles in addressing social exclusion, however, one must first revisit the definition of social exclusion, and explore what solutions to social exclusion should look to address.

As discussed in earlier chapters, social exclusion is both a multidimensional process and outcome. In order to truly address social exclusion, therefore, both process and outcome must be addressed. First, assistance must be provided to the socially excluded, the "groups [who find] themselves on the margins of society, as evidenced by outcomes of lower social and economic status, combined with a lack of power to change these outcomes" (SPCO, 2008(a)). This involves providing resources and supports which address the dimensions of social exclusion (social, political and economic) that result in individuals not being provided the opportunity to exercise the same "rights enjoyed by other citizens" (Abbott, 2000, p.88). Providing resources and supports, however, is only one part of the equation, as the provision of services does not address the underlying causes involved in the process of social exclusion. Therefore, attention must also be focused on the root causes involved in the process of social exclusion, the "true

economic, political and social aspects of ‘distancing’” (SPCO, 2008(a), p.23). This process is what works to deprive “individuals and families, groups and neighbourhoods of the resources required for participation in the social, economic and political activity of society as a whole” (Pierson, 2002, p.7). As discussed in earlier chapters, social exclusion results not only from welfare state reform and rescaling, but also the social welfare state’s underlying systems of stratification.

As a federated fundraiser, the United Way/Centraide Ottawa had originally been predominantly reactive, focused on only the outcome of social exclusion. The organization raised money and provided financial support to member nonprofit agencies in order to help them deal directly with the socially excluded. Besides the acknowledgement of a need for an organization to reduce the fundraising burden on nonprofit agencies, the United Way/Centraide Ottawa’s roles were fairly disconnected from the community. Moreover, the agency had developed no systematic rationale for the provision of funding beyond membership in the federation. The United Way/Centraide Ottawa’s fundraising and funding roles were thus indirect and disconnected from the processes involved in social exclusion.

Following its restructuring as an impact-driven organization, however, the United Way/Centraide Ottawa has challenged these original roles. While it retains its fundraiser role, it now directly seeks to proactively address both the outcomes and processes of social exclusion. As such, it is also an investor in the battle against social exclusion, a convener across sectors and scales, and a builder of community awareness surrounding issues of social exclusion.

5.3.1 Fundraiser

In order to raise the dollars necessary to tackle social exclusion, operating at the local level, the United Way/Centraide Ottawa continues to be a formidable and credible fundraiser, raising more than smaller organizations can on their own. Although various levels of government may lend financial support to a number of projects which United Way/Centraide Ottawa participates or partners in (to be discussed further below), no government funding comes directly to the organization for administration, programming, or resource development. Resources are raised through a variety of sources including individual donations, a federal governmental campaign (the Government of Canada Charitable Workplace Campaign), a community campaign (which targets all businesses and levels of government other than the federal government), and a retirees campaign. In addition to raising financial resources, other types of resources are also accumulated including gifts-in-kind, services-in-kind and valuable volunteer hours.

5.3.2 Investor in Social Exclusion

The United Way/Centraide Ottawa also plays crucial role in tackling social exclusion by investing the funds it raises back into the community, however, this role has changed substantially over the years. As mentioned above, the United Way/Centraide Ottawa previously funded agencies according to membership, with very little rationale for its funding decisions. In recognition of the need to respond to the increasingly complex needs in the community, and donor demands for accountability, responsibility and demonstrable impact, however, the United Way/Centraide Ottawa has shifted its focus.

Following the shift to funding agencies on the basis of demographically-associated impact areas, the United Way/Centraide Ottawa took the first step towards investing directly in social exclusion. The organization invested in agencies that aligned with its impact areas, focused on those who were the socially excluded in Ottawa. While important, these investments remained reactive, and focused on only the outcomes of social exclusion, that is, in programs directed towards the socially excluded.

In order to fulfill United Way/Centraide Ottawa's promise to invest resources where they are needed most and where they would have the greatest demonstrable impact, the United Way/Centraide Ottawa undertook further changes. The impact areas were taken out of their demographically-based silos as the organization worked to pursue a more intersectional approach to social exclusion. In doing so, the United Way/Centraide Ottawa went beyond identifying the socially excluded populations to try to understand the processes contributing to the production of social exclusion (see Table 6.2). This meant that the organization focused increasingly on investing in agencies, programs and community-wide initiatives that dealt with both the outcomes and processes of social exclusion. Such investments assist nonprofit organizations that deal with socially excluded populations (such as women, children, immigrants, visible minorities, disabled persons, seniors, etc.).

Further, in line with a broader management trend in the social welfare serving industry that sought greater accountability and transparency, the United Way/Centraide Ottawa recognized that it must take responsibility for such investments. This required analysis of the impact of investments on issues related to social exclusion. By requesting measurements and outcomes from its funded agency partners and programs, the United

Way/Centraide Ottawa is seeking to improve the lives of the socially excluded in Ottawa, and to enhance social inclusion on individual, systemic and community-wide levels.

The benefit of this shift is that the United Way/Centraide Ottawa has become a stronger player in seeking out solutions to the multidimensional factors involved in social exclusion. Although nonprofit organizations often tackle social exclusion by providing services to one particular demographic group or set of issues, United Way/Centraide Ottawa has the ability to look at the processes and outcomes of social exclusion in the community. By looking to root causes of social exclusion, the organization works to identify the various barriers that individuals and communities face in Ottawa, and tries to make connections between these to tackle social exclusion in a more holistic manner. The organization then seeks to “break down barriers and limitations” (H. Akanko, personal communication, January 13, 2010), in order to help socially excluded individuals get the opportunities needed to feel engaged socially, politically, institutionally and economically.

Although the United Way/Centraide Ottawa does not have the capacity to respond to all issues, it has made incremental steps toward tackling social exclusion as both a process and an outcome. While the actual impact of these investments is yet to be determined, the United Way/Centraide Ottawa is focused on investing in counteracting social exclusion in the community, not only in terms of outcome (dollars invested), but also through its attempts to achieve measurable results from its investments.

5.3.3 Interscalar Community Convener

Another way that the United Way/Centraide Ottawa addresses social exclusion is through its interscalar community convening and networking. Since issues of social exclusion are multidimensional and involve multiple players, the United Way/Centraide Ottawa has recognized that the best response to deeply rooted issues of social exclusion is through organizational and inter-sector collaboration. The United Way/Centraide Ottawa thus works to bring people and key stakeholders from various scales and sectors together in partnership, to act upon community issues related to social exclusion in a realistic way.

This role has grown incrementally alongside United Way/Centraide Ottawa's increased focus and vision. Until the late 1990s, the United Way/Centraide Ottawa dealt with only its member agencies, and its relationships with other sectors, including the market and the state, were related to fundraising only. As United Way/Centraide Ottawa's investments became more focused on impact and systematic change however, it recognized that it could not bring about the desired changes on its own. As a result, its interrelationships within and across other sectors have grown.

Working through a community development model, the United Way/Centraide Ottawa has become better able to bring players in all sectors and across all scales to the table to identify and help resolve local issues related to social exclusion (J.P. Thompson, personal communication, January 29, 2010). By nurturing open communication across the various scales of the social welfare diamond, the United Way/Centraide Ottawa is able to get a broader idea of not only the issues related to social exclusion, but also the intersectional responses that are needed to tackle the issues.

For example, through its community wide initiatives, the organization has taken a collaborative approach to finding solutions to issues related to social exclusion.

Examples of such initiatives include the Leadership Table on Homelessness, Success By Six and Hire Immigrants Ottawa. The Leadership Table on Homelessness is a joint initiative between the United Way/Centraide Ottawa and the City of Ottawa which is working on a 10-year plan to visibly reduce chronic homelessness in the community of Ottawa by including multiple players from across many sectors. Success By Six, another community wide initiative, looks to determine why certain children and youth have greater opportunities for success than others. This initiative bases its programming and direction on research that looks to issues of school readiness, neighborhood issues, and education for young children, and looks to support early child development in a holistic manner. Lastly, Hire Immigrants Ottawa (HIO) is a project that relies on the collaboration between the various levels of government, United Way/Centraide Ottawa and various nonprofit organizations. Born out of the recognition that many skilled immigrants in Ottawa were experiencing difficulties in finding adequate employment, HIO is focused on helping skilled immigrants gain access the Ottawa labour market by focusing on Ottawa's employers, and bringing together government, nonprofit and private players to rectify the situation of skilled immigrant under-hiring.

Through such community-wide initiatives the United Way/Centraide Ottawa has developed the capability to bring a multitude of forces together in collaboration and partnership with a goal of holistically addressing the issues of social exclusion in multidimensional ways. These players, including those from government, city, community, nonprofit and the business sector, come together to think about the issues

related to social exclusion, and to find fully-encompassing solutions to both its the outcomes and processes.

As a result of the organization's ability to convene a variety of qualified individuals, external stakeholders with specific interests have also actively sought out United Way/Centraide Ottawa's participation in initiatives. Examples of such situations include projects like Project S.T.E.P. (a youth drug treatment initiative), and a targeted community investment in the form of a local breakfast club program. In each of these situations, the United Way/Centraide Ottawa was approached to manage the programs, and to bring the necessary players to the table.

The various scales of government have also increasingly recognized the work of United Way/Centraide Ottawa in the community. As mentioned in earlier chapters, various scales of government are working with decreased funding and capacity limitations at the local level. As a result, governments at all levels are increasingly turning to organizations, like the United Way/Centraide Ottawa, as partners and collaborators on issues. This has resulted in the formation of growing relationships across all sectors of government, especially at the municipal and provincial scales. These relationships take varying forms, involving those funding, collaboration on issues and partnering in projects.

By supporting broader community and governmental partnerships, the United Way/Centraide Ottawa has actively sought to make a formidable and measurable difference to issues of social exclusion. This interscalar convening role places the United Way/Centraide Ottawa in the middle of the social welfare diamond, as it pursues relationships with the other sectors of the welfare state diamond. By fostering

engagement and support, a community element is present in the convening role of United Way/Centraide Ottawa that is lacking in governmental service delivery. While there are improvements to be made, the “United Way Ottawa has a distinct advantage in that it has access to all sectors, the business sector and labor market, but also governments” (Anonymous Interview Participant, personal communication, February 3, 2010). The organization has links in all directions to all sectors at all scales, and it is attempting to move forward in this role.

5.3.4 Community Awareness Builder

United Way/Centraide Ottawa also plays a valuable role in tackling social exclusion by increasing and enabling community awareness of the issues that exist locally. With its extensive knowledge of, and experience with, local level issues, United Way/Centraide Ottawa is able to increase levels of awareness and to advocate for action around specific issues across various sectors and scales of action.

By identifying the socially excluded in the community of Ottawa, as well as the root causes to their social exclusion, the United Way/Centraide Ottawa can help to create awareness in the community. By partnering in a variety of projects with the Social Planning Council of Ottawa, United Way/Centraide Ottawa has made consistent efforts to shed light on the issues of social exclusion in the community of Ottawa. By sharing its evidence-based research and information with the community, the organization is able to educate the community, and encourage community members to be aware of and act upon the issues surrounding them.

Through its connections with the various scales of government, the United Way/Centraide Ottawa is also able to inform policy makers and decision makers at various scales about social issues and problems in the community of Ottawa. Although the United Way/Centraide Ottawa has shied away from overt forms of advocacy and activism, it is able to influence government, even if in an indirect manner. The United Way/Centraide Ottawa is also looking to improve upon this role, as it seeks to enhance its ability to voice the need for recognition about the underlying issues related to social exclusion within the various scales of government.

This section has attempted to outline some of the roles, responsibilities and contributions of the United Way/Centraide Ottawa in tackling social exclusion within the social welfare diamond of Ottawa. While the roles listed above are by no means conclusive, they are those that are the most substantial for the organization's ability to tackle the outcomes and processes involved. The United Way/Centraide Ottawa is not simply a funder to a set number of member agencies as it was before. Rather, the United Way/Centraide Ottawa plays a series of additional roles and functions that reach beyond simple grant-making, and makes important contributions to tackling social exclusion within the community of Ottawa. While the organization continues to play a fundraising role, in response to recent transitions in the social welfare state and increased demands for accountability and responsibility, it has incorporated additional roles. It is an investor in issues related to both the outcome and processes involved in social exclusion, a community convener and a creator of awareness. In its fundraising and social investment roles, the United Way/Centraide Ottawa helps to build social inclusion in the community of Ottawa. Further, with its most recent transition, the United Way/Centraide Ottawa has

also sought to identify the root causes and systematic issues related to social exclusion, and has adapted its funding in a strategic manner to address them. In its convening role, the organization has also acknowledged the need for interscalar and holistic responses to social exclusion, by convening interested parties across scales and sectors to effect change in the most efficient and effective manner. The organization also enhances community awareness of social exclusion, by sharing information and experience with both the community at large, and social policy creators. Although the organization itself acknowledges improvements to be made, the integral, yet critical and focused steps that the organization has pursued, has resulted in it having central and unique roles in tackling social exclusion within the social welfare diamond of Ottawa.

5.4 Challenges to United Way/Centraide Ottawa's Role in Tackling Social Exclusion in Ottawa

Although the United Way/Centraide Ottawa has moved to increase its impact on both the outcomes and processes of social exclusion, these transitions have also resulted in a number of challenges. It is important to recognize such challenges in order to make improvements in the future.

5.4.1 Funding

Although the United Way/Centraide Ottawa has not been hit as hard by welfare state cutbacks, there remains the concern that the organization receives the majority of its funding through campaigns and donations, and is, therefore, dependent upon the generosity of the people in the community. Donor fatigue is a significant challenge to the organization, which has the potential to constrain the organizations ability to effect

change and have the impact that they want in the community: “There are several issues that need attention in Ottawa, and United Way will not necessarily always have the financial resources it would need to attend to all of them” (H. Akanko, personal communication, January 13, 2010). Further, when donors give to the United Way/Centraide Ottawa, they can specify where they would like their donation to be directed (L. Buske, personal communication, January 20, 2010). This donor-choice method makes it more difficult for the organization to effectively direct donations to those whom it deems most in need. Lastly, the United Way/Centraide Ottawa’s recent transitions also require that some funding be allocated towards research and outcome evaluations, which some donors may not understand, and may not support.

“Evaluation and outcome frameworks and research require resources and financial supports. If the donors want us to evaluate, which I absolutely think they should, then they have to understand we have to invest some money in those areas. We have to find the happy medium, because we certainly don’t want to take money away from programs to pay for evaluation, but at the same time we have to make sure we are being responsible, effective and efficient in achieving our outcomes. That requires measurements, which requires investments” (M. Sampson, personal communication, January 7, 2010).

Participants, both external and internal to the organization, however, indicated that with its strong ties and reputation, the United Way/Centraide Ottawa is able to continuously conduct efficient and effective fundraising campaigns from year to year. It has also been indicated that the more recent shifts towards impact and issue based investments has enhanced donations, as donors see value in United Way/Centraide Ottawa’s promise to invest money where it is needed most and where it will have the most impact.

5.4.2 Perception

The United Way/Centraide Ottawa's recent transformation has been met with some criticism, both internally and externally. The United Way/Centraide Ottawa is attempting to juggle the old expectations, associated with being a federated fundraiser, with its new focus and vision. Such perceptions may limit the organizations successful transformation.

“We've had to struggle to move away from the vision that we used to hold as a federated fundraiser. While we continue to fundraiser for the community, our investment structure has changed. I would speculate that it may be difficult for some of the agencies that we currently fund to understand this, as they may be uncertain about these changes. Agencies may feel entitled to the funding we provide as they have received it in the past. But now, we are seeking impact and results, which may not be entirely understood” (J. Highet, personal communication, January 21, 2010).

In an attempt to better understand the community's perception about the organizational shifts and restructuring taking place, extensive community consultations, with the public, donors, agencies and other interested parties, would help promote a broader understanding of the United Way/Centraide Ottawa's transformation, including its new focus, vision and promise in the community of Ottawa.

5.4.3 Increased Demands on Nonprofit agencies

The United Way/Centraide Ottawa's shift towards focused community priority issues and its increased requirements for specific and measurable results also reflects a broader management trend in the social welfare serving industry that seeks greater accountability and transparency. Funders, including United Way/Centraide Ottawa, want, and desire, results. They want to know whether the programs or agencies they are

funding are making a difference, and as a result, have placed a great amount of focus on developing evaluation tools that help them to do so. These demands, however, have contributed to the burden faced by nonprofit agencies in the local social welfare diamond. While agencies are generally supportive of funder's desires for increased accountability and responsibility, they also fear that the increased requirements may limit their access to funding and/or their stability within the sector (Anonymous Interview Participant, personal communication, February 4, 2010), as there is a concern from some agencies that they may lose their United Way/Centraide Ottawa funding (Anonymous Interview Participant, personal communication, February 12, 2010). There is also the concern that agencies may drift from their original missions to fit United Way/Centraide Ottawa's funding protocol. Rather than fostering innovation and creativity from agencies, therefore, the organization's new practices may in fact lead to stagnation, as agencies become less inclined to respond to social issues in unique and experimental fashions out of fear of losing their funding (Anonymous Interview Participant, personal communication, February 12, 2010). Further, although United Way/Centraide Ottawa tends to offer longer-term funding than some funders, some believe that its focus on funding programs, as opposed to offering core funding support, weakens the sustainability and flexibility of nonprofit agencies:

"United Way needs to realize that the social welfare community is changing and needs to focus on core funding. The [nonprofit] sector is in a crisis time for funding and we are struggling to stay afloat. The future is also going to bring difficult times and increased reliance on the sector, so we need to ensure that the organizations that are out there helping people, are getting the financial support that they need" (Anonymous Interview Participant, personal communication, February 3, 2010).

Lastly, the increased requirement for outcome measurement is a common concern amongst agencies. In light of short-term contracts and project-based funding, many agencies feel overwhelmed due to their limited capacity to conduct such reports. Agencies are concerned that the time it will take to produce reports will take away from their primary purpose and mandate. Further, while measurements and outcomes requests from funders are by no means an unnecessary request, there is often a repetition of measurement requests from different funders. If an agency is funded by more than one source, and each source requests results reports, then one can most definitely understand the increased burden being placed on the agency.

In response to such concerns, many individuals, both external and internal to the United Way/Centraide Ottawa, argue that in order to ensure the desired impacts, there is a need to request outcome measurements. “We want our actions to result in making measurable changes in the community. We shouldn’t just provide services blindly. All nonprofit organizations should seek measurements, and if that is going to be a challenge, well then we have failed somewhere” (M. Allen, personal communication, February 10, 2010).

While focused investments and measurements are beneficial to the nonprofit sector in general, the United Way/Centraide Ottawa does not seek to constrain the assets of the agencies it funds. The organization understands that there are problems for agencies in terms of receiving funding, however in order to balance demands for measurement, increased thoughtful and cautious dialogue is needed between the agencies and funders, including governments, to rectify this issue. For example, many United Way/Centraide Ottawa participants recognized a need for agencies and funders, including

United Way/Centraide Ottawa, to come together to establish common measurements. Instead of negating the importance of measurements, what is needed is a collaborative effort by funders to unify measurement requirements, and to make them broad and easy enough to report upon for the nonprofit sector. This, however, is easier said than done, as each funder has different priorities for the community. Genuine progress depends on funders, including the United Way/Centraide Ottawa, and various service providers, working together to learn each other's capacities and functions within a new framework seeking accountability and responsibility. While the organization is interested in enhancing this dialogue, concrete steps have yet to be taken in this regard.

5.4.4 Increasing Advocacy

While the United Way/Centraide Ottawa promotes collaboration and communication amongst the various scales and sectors of the welfare diamond in Ottawa, internally and externally, there is a recognition that the organization has to do much more with its connections and relationships. Despite its historical tendency to shy away from direct advocacy, in order to truly engage all sectors in the issues and problems of social exclusion the United Way/Centraide Ottawa must enhance its engagement in policy work through structured and formal relationships with government of all scales. In this way, it can shed greater light on the deeply rooted issues of social exclusion faced by individuals in Ottawa. The research and information that the organization is privy to has the ability to uncover the significant problems faced by the vulnerable populations of Ottawa. By sharing this information, the United Way/Centraide Ottawa can help to endorse actions

for change. Thus, the United Way/Centraide Ottawa must seek an advocacy role in the various scales of government social policy.

The United Way/Centraide Ottawa also has the ability to promote a voice for the struggling nonprofit sector. As discussed in earlier chapters, the nonprofit sector in Ottawa, and across Canada, has found itself in an increasingly fragile state, facing increased responsibilities, escalating community needs and dwindling resources. The United Way/Centraide Ottawa, however, has the ability to help begin to rectify this situation. Open communication between its agencies and the United Way/Centraide Ottawa is a first step. Further, through its connections at various scales of government, the United Way/Centraide Ottawa can provide the nonprofit sector with a voice, and enhance policy awareness of issues related to social exclusion that such nonprofit organizations address. In order to effect change and tackle the issues faced by the nonprofit sector, the United Way/Centraide Ottawa, therefore, needs to advocate for the sector within which it works.

In conclusion, while significant movement has been made on behalf of the United Way/Centraide Ottawa towards targeting investments in social exclusion and adjusting requirements to fit such investments, there remain challenges to this transition. Relying on donations from donors is never a given, and caution is required as there is never 100% certainty that the funding will always be present to deal with the issues desired. Further, the narrowed focus and targeted investments by the organization, while notably well-intentioned in its attempts to tackle social inclusion, have contributed to the volatile environment faced by nonprofit agencies. Open and fluid dialogue with the nonprofit agencies in the Ottawa region is essential to this transition. The United Way/Centraide

Ottawa, with its knowledge and voice, must ensure that there is a cross-fertilization of understanding between both itself and the nonprofit sector. While its desire to increase impact, target funding and ensure demonstrable change through program measurements is a step in the right direction to enhancing and targeting issues of social exclusion, the agencies which United Way/Centraide Ottawa funds, must be included in the dialogue. Further, stringent controls and reporting requirements may hinder nonprofit agencies' ability to meet the demands of their local communities. Collaboration, communication and open dialogue may help curb some of the anxieties faced by the nonprofit agencies in the community of Ottawa in this regard. Lastly, the United Way/Centraide Ottawa's size, connections and influence in the community needs to be pushed further within the scales of government in an advocacy manner, to not only provide a voice to the issues of social exclusion, but to also provide a voice to the nonprofit sector in the community of Ottawa. In this way, the research and advocacy role of the United Way/Centraide Ottawa could be enhanced and integrated into policy discussions related to issues of social exclusion.

5.5 Conclusion

The United Way/Centraide Ottawa, a nonprofit public foundation in the community of Ottawa, has undergone significant changes in recent years. In response to a shifting social welfare state, increased needs and demands from the community, and rising calls for accountability, the organization has found itself needing to adapt its operations. Following such changes, this chapter has shown that, despite some challenges, the United Way/Centraide Ottawa is increasingly playing a central and

pivotal role in tackling social exclusion in the multiscale social welfare diamond of Ottawa.

Through its identification of community priority issues, goals, outcomes, and strategies, the United Way/Centraide Ottawa has developed a unique vision of social exclusion in the community of Ottawa that speaks to not only the outcomes, but to the deeply rooted causes and process which contribute to this outcome. Through targeted investments and community convening, the organization also works to respond to these community issues in a strategic, organizational and collaborative manner. It also demands results and measurements from funded organizations, and holds itself accountable for seeking out and enacting impactful changes to issues of social exclusion. The organization can also enhance community awareness and provide guidance, across various scales and sectors, on what the key issues related to social exclusion in the community of Ottawa truly are.

While there is always room for improvement, the United Way/Centraide Ottawa is focusing on making positive changes in relation to tackling social exclusion in the community of Ottawa. It seeks to make movement towards the alleviation of problems associated with social exclusion, rather than reacting to its outcomes alone. By thinking critically, making strategic investments and engaging all members across sectors and within various scales, the organization is taking steps forward towards addressing social exclusion in a holistic and systematic way that will benefit the socially excluded of Ottawa, as well as the community as a whole.

CHAPTER 6 - Conclusion

6.1 Introduction

This thesis began with the recognition of a need to expand theoretical thinking related to social welfare, to incorporate an understanding of the roles of the nonprofit sector in the provision of social welfare supports. Despite the nonprofit sector's prominence in social welfare service delivery and funding, the roles of this community sector have often been under-researched, as there continues to be little understanding about the nonprofit sector in Canada (Dreessen, 2000; Scott, 2003(a)). Nonprofit organizations are "critical but often invisible payers" in dealing with social exclusion in the Canadian social welfare system (Curtis, n.d., p.2), and therefore there is a need to further understand what their roles and challenges are in tackling social exclusion in the local communities within which they operate. This thesis, therefore, has sought to address this lacuna, by investigating the roles of one local nonprofit public foundation in tackling social exclusion; the United Way/Centraide Ottawa.

6.2 Summary of the research

This thesis has argued that the community sector's roles in tackling social exclusion at the local scale have been overlooked by theorists of the welfare state. As discussed in chapter one, traditional comparative models, such as that of Esping-Andersen (1990), continue to focus on the welfare state triad consisting of the state, the market and the family. Using such models, Canada is typically classified as a 'liberal' welfare state regime, consisting of a heavy reliance on the market and family, which is supplemented by remedial national welfare state supports. This conception, while not

without its uses, ignores important elements. In order to understand the role of organizations like the United Way/Centraide Ottawa, therefore, Esping-Andersen's (1990) welfare regime model needed to be supplemented with (a) the inclusion of the community nonprofit sector into the analysis of the social welfare state, making the analysis one concerning the 'welfare diamond' (b) the introduction of scalar analysis, which allowed the reader to understand Canada as a multiscale social welfare state, and (c) an understanding of the concept of social exclusion, including the multidimensional factors which contribute to this phenomenon as both a process and an outcome, such as welfare state rescaling and deeply rooted patterns of social citizenship inequality. Introducing these three elements to Esping-Andersen's (1990) theory allowed me to approach social welfare in Canada as a complex, interconnected and dynamic process, which includes more than simply the social welfare state. Instead, this chapter showed that the social welfare framework in Canada is one defined by a multiscale welfare diamond, with nonprofit organizations playing an integral role in tackling social exclusion at the local scale.

Chapter two sought to further investigate the local nonprofit sector of this multiscale Canadian welfare diamond. While the nonprofit sector has long played a role in tackling social exclusion, over the past two decades, its responsibilities have grown incrementally. State demands for welfare reform have led to a restructuring and withdrawal of the welfare state from direct social welfare programming and service delivery. As a result, the nonprofit sector has been increasingly relied upon to meet the needs of socially excluded communities at the local scale. While such organizations serve a benefit to both the welfare state and the local communities in which they work,

this increased reliance has occurred in a time of decreased and unstable funding, and at a time when funders and donors began to increasingly seek accountable results. This volatile environment puts pressure on the nonprofit sector to reform and restructure. To effectively tackle social exclusion at the local scale, therefore, nonprofit organizations have needed to refocus and realign their work.

To understand the United Way/Centraide Ottawa's roles, the reader was also made aware of the complexities involved in social exclusion. As discussed in chapters three and four, social exclusion is both a multidimensional outcome and process. These chapters also acknowledged that in order for social welfare actors to effectively tackle issues of social exclusion, they must recognize both aspects. Beyond welfare state restructuring resulting in increased levels of social exclusion, particular populations have also continuously been exposed to greater experiences of social exclusion. The original conception of equal social citizenship, therefore, needed to be nuanced by adding an analysis of the deeply rooted patterns of stratification and inequality embedded within the Canadian social welfare state. Paired with welfare state restructuring, such patterns of inequality and stratification increase the level of need at the local scale for particular population groups: women, children and youth, visible/ethnic minorities and immigrants, disabled persons and seniors.

Chapter five then investigated the case study, the United Way/Centraide Ottawa, and explained how this organization plays a vital role in tackling social exclusion within the community of Ottawa. Although the organization does not directly deliver social services, it plays other roles that are very important to tackling social exclusion in Ottawa. These roles have changed over time, and the United Way/Centraide Ottawa has

undertaken significant transitions in response to multiscalar social policy reforms, demands for increased accountability from donors, and increased demands from nonprofit agencies for funding in a time of greater need and less financial stability. As a result, the United Way/Centraide Ottawa has refocused its mission on tackling social exclusion in Ottawa. Currently, the organization continues to fundraise for recipient agencies, but more importantly, it addresses social exclusion in a many other ways. The organization targets investments where it believes it will make the most impact on social exclusion. The areas for investment are also chosen based on an understanding of social exclusion that looks at underlying root causes. The United Way/Centraide Ottawa also engages other sectors and scales of the Canadian social welfare diamond, by interacting within and across all sectors. Lastly, the organization has the ability to advocate and share knowledge in relation to the issues of social exclusion in the community of Ottawa, building community awareness and support in the process.

While there remain improvements to be made, this thesis has shown that the United Way/Centraide Ottawa plays a valuable role in tackling social exclusion within the local social welfare diamond of Ottawa, which is unrecognized in the traditional theories of social welfare. By acknowledging these roles, traditional social welfare theories, which tend to focus on the roles of states, markets and families, have been challenged. Welfare states cannot tackle issues of social welfare and social exclusion on their own, nor can any other sector for that matter. Rather, as discussed in chapter five, in order to effectively tackle both the outcomes and processes involved in social exclusion, we must mix these “institutional domains [to] provide a more sustainable and flexible framework for enhancing human well-being” (Wood & Gough, 2006, p.1697).

Collaboration and communication with, and recognition of the importance of (a) the nonprofit sector in general, and (b) the United Way/Centraide Ottawa as a public foundation, are each necessary in order to effectively deal with issues of social exclusion.

6.3 Contributions of the research

The contributions of this thesis are both theoretical and practical. From a theoretical perspective, this thesis has addressed the lacuna in many historical and contemporary social welfare theories which continue to focus on the triad of states, markets and families. Instead, this thesis has argued that the nonprofit sector, including public foundations, have historically played, and continue to play a vital role in the Canadian 'liberal' social welfare state. While an understanding of state involvement in social welfare is important, so to are the roles of the nonprofit community sector. Further, this thesis has also argued, by introducing scalar theory, that not only are the relationships between the nonprofit sector and the multiscalar state dynamic and continually changing, but also, that welfare state reform and rescaling has overtly increased the roles and responsibilities of the nonprofit sector in the social welfare diamond, particularly at the local scale.

This thesis has also shown that the optimal responses to social exclusion cannot be focused on the outcomes of social exclusion alone. Rather, effective responses to social exclusion, must deal with both the multidimensional outcomes and processes related to social exclusion, and seek collaborative solutions to such issues. All sectors dealing with social inclusion, including those of the state, can benefit from such a perspective. Such methods, including those of narrowing focus and enhancing outcomes

measurements, however, may result in limiting the effectiveness of organizations ability to tackle social exclusion. As a result, this thesis has also acknowledged the vital importance of enhanced communication and collaboration across and within sectors, including between the state and the nonprofit sector, in order to optimize responses to social exclusion.

6.4 Limitations of the research

It is also important to acknowledge some of the limitations of this thesis. First, the data gathered was from one particular organization within the nonprofit sector in Ottawa, the United Way/Centraide Ottawa. For this reason, while lessons may be learned, and information may be shared across sectors, the results are unique to this organization within the socio-political context of Ottawa, and cannot be generalized across the nonprofit sector. In future research it would be interesting to incorporate other nonprofit public foundations operating in Ottawa, as well as to provide intranational or international comparisons of the roles, functions and contributions of other nonprofit public foundations across Canada or around the globe.

6.5 Final Words

In conclusion, despite the aforementioned limitations, this thesis has satisfied its original objectives and validated its hypothesis. This thesis argued that there was minimal research of the role of nonprofit organizations within traditional social welfare research methods. This thesis has also argued that the nonprofit sector plays a valuable role within the social welfare diamond in tackling issues of social exclusion. It did so by

using the United Way/Centraide Ottawa as a case study, and showed that, through various methods, this organization has effectively taken strides to ameliorating the situation and conditions of socially excluded populations.

This thesis has also shown that in order to effectively tackle issues of need and social exclusion, particularly at the local scale, there needs to be a greater recognition on behalf of all sectors of the roles of nonprofit organizations in the multiscale social welfare diamond in tackling social exclusion. Further, responses to social exclusion, in order to be truly effective, must simultaneously address both the outcomes and processes related to social exclusion, for reactive responses do not deal with the systematic and deeply rooted patterns of inequality and stratification in Canadian society.

While the United Way/Centraide Ottawa is one example of a nonprofit organization that has responded to organizational and socio-political challenges in a way which deals with both the processes and outcomes of social exclusion, there is still room for improvement. Neither states, markets, communities, nor families alone can effectively tackle social exclusion. The entire social welfare diamond in Ottawa would benefit from increased communication, collaboration and partnerships that work in cooperation across scales and sectors, including an acknowledgement and support of the work done by nonprofit organizations, such as public foundations, in tackling social exclusion.

Appendix A: Interview Questions

SECTION 1: General Introductory Questions:

1. Name and official position
2. How long have you worked for the United Way/Centraide, and in what capacity(ies)?
3. Have you worked for other nonprofit organizations? If yes, which one(s) and in what capacity(ies)?

SECTION 2: Social Welfare Regimes/Structures and Nonprofit Organizations:

1. What do you believe to be the general primary roles/functions of nonprofit organizations in their respective communities?
2. Where you would place nonprofit organizations IN GENERAL, in terms of this 'social welfare diamond'. i.e. would you place them 'beside' or 'below' or 'above' official state-run/governmental organizations.
3. Do you think that government and/or society recognizes the role that nonprofits play?

SECTION 3: United Way/Centraide Ottawa:

1. Given your experience working/dealing with the United Way/Centraide Ottawa, what do you believe to be the primary roles/functions of the United Way/Centraide Ottawa in the Community of Ottawa?
2. What financial contributions does the United Way/Centraide Ottawa make to the community of Ottawa?
3. What 'other' contributions does the United Way/Centraide Ottawa make to the community of Ottawa (besides financial)?
In what ways, in what forms? (ex. research, intelligence, driven programs, partnerships, etc.)
Are these different from those currently offered by state-driven governmental organizations? If yes, how so?
4. What makes the United Way/Centraide Ottawa different, if at all, from other nonprofit organizations in the community of Ottawa?
i.e. programs, structure, organization, methods, etc.

5. What do you perceive the relationship between the United Way/Centraide Ottawa and the various levels of government (federal, provincial, municipal) to be? IS the role of nonprofits recognized by the levels of government?

6. Can you discuss any of the current programs in place at United Way Ottawa that have been partnered with or supported by various scales of government?

7. As social policy shifts and rescales, and as social priorities change which impacts social welfare funding, how does this impact upon the United Way/Centraide Ottawa? What are the organizational challenges when it comes to such changes? How does the United Way/Centraide Ottawa react organizationally?

8. Limitations/Blockages to United Way/Centraide Ottawa

9. What improvements can be made by United Way/Centraide Ottawa?

SECTION 4: United Way/Centraide Ottawa's Financial Investment and Evaluation Process

1. How does United Way/Centraide Ottawa select its impact initiatives (previously impact groups)?

2. How does United Way/Centraide Ottawa select its recipient organizations/agencies and programs?

3. Is there any concern of mission-drift for recipient nonprofit organizations? If so, what is done about it? If not, why?

4. How does the United Way/Centraide Ottawa measure its impact and contributions in terms of outcomes? What makes the United Way/Centraide Ottawa different, if at all, from other nonprofit organizations in the community of Ottawa in this respect? How does United Way demonstrate that need and measure that those needs are being met?

5. What benefit, if any, is there in ensuring or promoting government representation or awareness of these impact initiatives, for example what benefit, if any, would be gained with inserting these areas into social policy and debate?

SECTION 5: General Concluding Statements:

Seeing as there is little research on nonprofit organizations in the academic world, what would you want the public, academics and other professional organizations to know about nonprofits in general? What about United Way/Centraide Ottawa specifically?

Appendix B: Letter of Information

Date

Participant's name

Position

Agency

Address

Re: research interview request

Dear (participant's name)

My name is Katherine Solc and I am a MA Sociology student in the Faculty of Arts and Social Sciences at Carleton University, Ottawa, Canada. I am currently pursuing research on the nonprofit sector in Canada. In particular, I am writing my thesis with a focus on the United Way/Centraide Ottawa's impact and contribution to the community of Ottawa, and I would like to ask if you could make some time available for an interview with me in regards to your expertise and experience with the United Way/Centraide Ottawa.

I am interested in examining the myth that nonprofit's around the world, and in Canada in particular, are solely gap-fillers in the Canadian welfare state. As such I will be using the United Way/Centraide Ottawa as a case study of a nonprofit organization in the city of Ottawa, in the form of a foundation, to determine what impacts and contributions, if any, this organization has within the community of Ottawa. My discussions and interviews moving forward will be with individuals involved in the United Way/Centraide Ottawa in multiple ways (employee, funded agency, researcher, etc). Any insights you may be able to provide would be decidedly beneficial to my research.

The interview will take anywhere between one and two hours. If there is a need for more interviews with you, I will ask for another appointment through e-mail or phone, however if you so chose, you may refuse a follow-up interview. The interviews will take place at a time and location convenient to you. The questions will be both open and closed-ended. Your interview will be recorded with your permission and the transcription will be done by me.

Although there is no foreseen risk to you, above the minimal level, your real name and your professional position within your organization will be used. Therefore, as will be offered to all participants, if you wish, for privacy purposes, for certain (or all) of your answers to remain un-attributable, then your answer(s) will appear in the final work without any reference to your name or position as requested. All questions will be related to your professional role, however your personal opinions and viewpoints are welcomed, yet not demanded. You may refuse to answer, may stop the interview at any time, and withdraw from the study up until the time that I begin the thesis writing process (April 1st, 2010). After that time, it would be difficult to remove your information from the study. All related material to the interview with you will be kept in a locked filing cabinet until the end of the research (data-collection) date which is the March 31st 2010. All

computer data will be stored in removable devices. Once thesis approval has been granted (i.e. once the thesis has been defended by the researcher and accepted by the researcher's thesis committee), all data (personal information, audio recordings, and transcriptions) will be destroyed appropriately.

It is my hope that the research will help to inform reflection and debate on public policy surrounding the nonprofit sector in general by using the United Way/Centraide Ottawa as a case study. However, you should not expect that it will directly benefit you or *(particular institution or program)* in any way.

An electronic copy of the thesis will be provided to you upon request.

My MA supervisor is Dr. Rianne Mahon, Department of Sociology and Anthropology
Her contact information is: Room A818 Leob Building, Carleton University, 1125
Colonel By Drive, Ottawa, ON, K1S 5B6; Tel: (613) 520-2600 extension 8858; email:
rienne_mahon@carleton.ca

This project has been reviewed and received ethics clearance through Carleton University's Research Ethic Board. For your concerns or questions about your involvement in the study, you can address them to the ethics board chair:

Prof. Antonio Gualtieri, Chair
Research Ethics Board
Office of Research Services 510B Tory
Carleton University
1125 Colonel By Drive
Ottawa, ON K1S 5B6
Telephone: 613-520-2517
Fax: 613-520-2521
ethics@carleton.ca

Thank you very much for considering my request and I look forward to meeting you during the period of my research.

Sincerely,

Signature
Katherine Solc
M.A. Student
Department of Sociology & Anthropology
Faculty of Arts and Social Sciences
Carleton University
E-mail: ksolc@connect.carleton.ca

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Allen, M. President and Chief Executive Officer, United Way/Centraide Ottawa

Austen, P. Senior Director, Impact Strategies, Community Services, United Way/Centraide Ottawa

Beutel, M. Manager, Investor Development and Stewardship, United Way/Centraide Ottawa

Bradley, R. Senior Director, Leadership Table on Homelessness, United Way/Centraide Ottawa

Buske, L. Director, Strategic Giving Systems, Investor Development, United Way/Centraide Ottawa

Diguer, K. Senior Director, Planning and Evaluation, Community Services, United Way/Centraide Ottawa

Gagnon, C. Vice-President, Investor Development, United Way/Centraide Ottawa

Hight, J. Vice-President, Campaigns, United Way/Centraide Ottawa

Norris, L. Manager, Major Gifts, Investor Development, United Way/Centraide Ottawa

Sampson, M. Director, Produce Development, Investor Development, United Way/Centraide Ottawa

Sebold, M. Senior Manager, Public Policy and Research, Hire Immigrants Ottawa, United Way/Centraide Ottawa

Steeves, P. Manager, Research and Evaluation, Success By Six, United Way/Centraide Ottawa

Thompson, J. P. Manager, Research and Policy, United Way/Centraide Ottawa

Tupitsyn, I. Manager, Evaluation and Data Analysis, Stewardship and Investment Team, United Way/Centraide Ottawa

Wilson, S. Manager, Major Gifts, Investor Development, United Way/Centraide Ottawa

13 Anonymous Interviewees

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