



CALEDON
INSTITUTE OF SOCIAL POLICY

25 years of informing the debate

A tribute to the
Caledon Institute of Social Policy



25
years
of informing
the debate

A tribute to the
Caledon Institute of Social Policy



PRIME MINISTER • PREMIER MINISTRE

Statement from the Prime Minister of Canada

It is with great pleasure that I pay tribute and thank everyone at the Caledon Institute of Social Policy for their impact in the field of social policy over the last 25 years.

This year marks a momentous occasion in our nation's history: the 150th anniversary of Canada's Confederation. Throughout 2017, Canadians will come together to celebrate our country's accomplishments and triumphs, as well as our shared values of compassion, diversity, and inclusion.

For 25 years, the Caledon Institute of Social Policy has been relied on by various branches of government for their insights and recommendations on a plethora of issues. As Prime Minister, I wish to thank Mr. Ken Battle and his team over the years for the positive impact they have had on many.

On behalf of the Government of Canada, I wish you all the very best and success with your future endeavours.

Please accept my warmest regards!

A handwritten signature in blue ink, appearing to read "Justin Trudeau", with a long horizontal flourish extending to the right.

Ottawa
2017



PRIME MINISTER • PREMIER MINISTRE

Ottawa, Ontario
K1A 0A2

June 13, 2000

Dear Ken:

I am writing to thank you for being a member of the Canadian delegation which recently participated in the conference on "Progressive Governance for the 21st Century" in Berlin. I am very proud of the active and constructive role that the Canadian delegation played at the conference, and I particularly appreciated the advice that the group gave to me before the leaders' meeting. I am committed to continuing to participate in the international dialogue on progressive government, and I hope to be able to draw on the expertise of this remarkable group of Canadians again.

Enclosed for your information is a copy of the communiqué from the leaders' meeting which was released on June 3, 2000. It lays out the themes of the leaders' discussion and some of our conclusions. It also indicates that a network of experts will be created to continue to dialogue begun at Berlin. I encourage you to participate in this new network.

I will try to arrange a meeting in Ottawa in the Fall where the whole group can pursue the interesting discussions you and I began in Germany. I very much enjoyed our conversation on the airplane. You have been an invaluable advisor to a number of my Ministers and to my own office on social policy. I know I can count on your continuing advice as we build on what we have begun. Thank you again for taking time out of your busy schedule to join me.

Sincerely,

A handwritten signature in cursive script that reads "Jean Chrétien".

Mr. Ken Battle
President
Caledon Institute
1600 Scott Street, Suite 620
Ottawa, Ontario
K1Y 4N7



Introduction

When Ken Battle and I began to talk in 1991 about creating the Caledon Institute of Social Policy, we started with our shared ideas of what it should be and what it should do. The conversation was practical, based on our shared interest in creating effective work to fight poverty in Canada. We both believed that government, doing the right things, was uniquely able to work at scale to improve lives, but that it needed good advice in policy and program design.

We wanted Caledon to do high quality work, starting with data and working towards implementable conclusions. This might sound obvious but is still not as commonplace as one might hope. Ken's history before Caledon, and to this day, is a dedication to study the data in order to discern its patterns and to create knowledge.

We wanted Caledon to be independent and nonpartisan. In practice we had more invitations to contribute to governments of a progressive bent, but we were open to all. Caledon had friends and critics across the political spectrum. We also saw social policy more broadly than just generated by governments. Social policy should also be created by civil society, large institutions, and corporations.

We wanted Caledon to be solutions oriented, and not merely another member of the chorus in the *culture of complaint* which preoccupies itself with describing problems and assigning blame. While describing problems is a necessary analytical step, we wanted to go beyond that to craft what one observer called "policy-ready" ideas. We wanted to deal with reality, not utopia. We also wanted Caledon to have an impact on the public agenda, which meant writing about complex issues accessibly and incorporating good imagery. "Social policy by stealth" and the "welfare wall" are two that stand out.

A quarter century later, a body of impressive work is testament to these design ideas. Caledon has remained true to data, and has crafted its work in the real world of public policy where programs have to be paid for and have to work; it has never fallen for the flavour of the month. That body of work will migrate to a

Caledon archive on the Maytree website, which will be curated to bring forward incisive pieces when the public discourse comes around again to discuss, say, pensions, income supports for people living with a disability, or “bracket creep” in the tax system.

Ken Battle’s creation of Caledon, with the support of Sherri Torjman, Michael Mendelson, Anne Makhoul, and Melanie Burston, has made an indelible contribution to Canada. The body of work over a quarter of a century has been an inspiring contribution to nation-building. The tributes in this book reflect the range and depth of that gift to Canada.

ALAN BROADBENT

Chairman, Maytree
Chairman and CEO, Avana Capital Corporation



Tributes

Growing insight and influence on social policy transformation in Canada

One of the first phone calls I made after becoming Minister of Finance was to Ken Battle to say that I wanted to talk social policy with him and his team. I cannot count the number of times since then that as Minister of Finance or Prime Minister I made similar calls to someone at the Caledon Institute. Such was its growing insight and influence on the transformation of social policy in Canada. This legacy will continue to be felt for eons to come, and the country is so much the better for it. The Institute will be sorely missed. Indeed, I issue fair warning to Ken, Sherri, Michael and Alan that the Martin Family Initiative has your phone numbers. We'll be calling soon.

PAUL MARTIN

Prime Minister of Canada, 2003 – 2006

Minister of Finance, 1993 – 2002

In praise of Caledon

Information inequality may be the most pernicious inequality of all. In most democracies, the affluent, the educated, and the well organized have no difficulty generating data to amplify their voices in policy debates. In contrast, the poor and marginalized lack the capacity to translate their problems into the analytical forms that the policy world notices. Caledon's fundamental contribution has been to narrow information inequality in Canada. It created original data sets that could not be found elsewhere, as in the case of *Welfare Incomes*; and it dug deeply into official statistics to lay bare the problems faced by poor families, people with disabilities, the unemployed and the precariously employed, and other vulnerable groups. But Caledon never made the mistake, so frequent in academia, of being satisfied with mere analysis. Ken, Sherri, Michael, and others used analysis as a platform on which to construct serious policy proposals, many of which influenced the course of government decisions. Child benefits was an obvious case, but it was hardly the only program influenced by their labours. When the full history of Canadian social policy is written, the role of Caledon will emerge in many chapters.

In a political world of alternative facts, fake news, and polarized debates, Caledon stood tall as a source that could be trusted. It deftly avoided ancient ideological battles, concentrating on carefully crafted policy proposals. In so doing, Caledon helped Canadians understand their country and its social problems more clearly. It narrowed the information gap between the affluent and the poor. And it nudged social policy in a more progressive direction. This is a record of which Caledon and its supporters can be very proud.

KEITH BANTING

Professor of Political Studies and Policy Studies, and Queen's Research Chair in Public Policy, Queen's University

Caledon's work matters because social policy matters

I first met Ken and Sherri at the tenth anniversary gathering of Caledon and was immediately impressed. Alan Broadbent, who co-founded the Tamarack Institute with me, invited me to attend. Both Ken and Sherri were rigorous in their research and prolific in the number of issues they addressed over the years. Governments at the federal, provincial/territorial and local levels all used Caledon papers to inform their own discussions and the implementation of important social policies.

Caledon became an important partner with Tamarack and the McConnell Foundation as co-founders of Vibrant Communities Canada-Cities Reducing Poverty where it led the research and learning component of this national initiative. Its work informed the directions we took and inspired us to think about the important role of local government in poverty reduction.

In a recent interview, I asked Ken and Sherri to reflect on Caledon's contribution. Ken was most engaged about his work on child benefit reform, which he worked on throughout his career since the 1970s and certainly during his 25 years at Caledon. (See *Child Benefits in Canada: Politics Versus Policy*, June 2015, for an important overview of this work.) We spoke at length about his contribution to the development of empirical, fact-based social policy in Canada. His contribution cannot be overstated as his work, in no small part, shaped one of the most important child benefit programs in place within Canada today. In 2000, he was awarded the Order of Canada (social sciences category) in part for his work on this National Child Benefit.

Sherri's reflection covered various areas that included her important work examining the impact of the "welfare wall:" a term used to describe the obstacles faced by welfare recipients when they enter/re-enter the labour market. This included exploring the link between the welfare wall and a range of interventions including: disability income and supports, and assistance with other essential costs. (See Sherri's paper *Breaking Down the Welfare Wall* for an

overview of this work.) Sherri has been recognized for her work, as well as her ability to be deeply engaging, and to speak with tremendous power, credibility, and vision. In recognition of her work, she received the Champion of Human Services Award from the Ontario Municipal Social Services Association in 2011 and the Top 25 Canadians Award from the Canadian Association of Retired Persons in 2010.

For me personally, a paper that Caledon released (under Sherri's authorship) just as we were founding Tamarack has always been particularly influential. It was called *Reclaiming Our Humanity* and I always remember it because this paper was the first time I had seen social policy written in such visionary terms. It influenced me, and in turn the work of Vibrant Communities, for many years to come.

It is hard to imagine a Canada without the powerful voice of the Caledon Institute. Its work matters because social policy matters. Social policy arises from a common understanding of how we, as Canadians, want to care for one another. Thank you so much Ken, Alan, Sherri, Michael, Melanie, Anne and the many associates, volunteers, partners, and board members who have supported your important work for a quarter century. Your work and contributions to this country will live on in no small part through the many people you have influenced and inspired. I am proud to be one of them.

PAUL BORN

Co-CEO, Tamarack Institute

Refuting the notion that policy research and advocacy cannot co-exist

Caledon refutes the notion that policy research and advocacy cannot co-exist, that the latter is bound to taint the former. Of course the Institute had values and principles, a broadly liberal and progressive view of the role good public policy could play in improving society, especially for the marginalized or disadvantaged. But its research was thorough, evidence-based and practical – which is why the Institute was influential beyond its size.

My experience of Caledon's "engaged scholarship" arose from our collaboration in the Vibrant Communities initiative. The Caledon Institute, Tamarack Institute and the McConnell Foundation were the "three legs" of this evolving program to tackle poverty in Canadian communities. Tamarack supplied the vision and operational capacity, McConnell provided the funding, and Caledon generated a stream of data, evidence, and results to guide the emergent strategy. Together we met every six months or so to review progress, ask ourselves what was working and what was not, and how we could share our findings with an ever-growing number of community partners.

This all sounds very worthy, an early (and perhaps still rare) example of wary engagement among people with divergent interests but a common purpose: the community Animator putting the best gloss on the inevitable setbacks and road bumps, the detached outside Evaluator pointing out shortfalls and missteps, and the Funder demanding results. In fact, what I recall is far from that picture: Animated conversations about the theory and practice of eradicating poverty that drew on our widely differing but complementary experiences, probing and challenging each other – all of it over a sumptuous breakfast in Sherri's kitchen.

Miraculously, out of these discussions as well as its meticulous fact-gathering and community-level enquiry, Caledon would produce a new document that ordered and explained how Vibrant Communities was making a difference and how its impact could be magnified: practice, theory, and wherewithal joined together with a big helping of mutual respect and appreciation and – in Paul Born’s words – much joy.

TIM BRODHEAD

President and Chief Executive Officer of the J.W. McConnell Family Foundation, 1995 – 2011, and
Interim President and Chief Executive Officer of the Pierre Elliott Trudeau Foundation, 2013 – 2014

Caledon's work matters because social policy matters

Caledon could always be counted on to do first-class, quality research. It was always topical and always pointed. It played into the public discourse among policy elites in very serious ways. It informed the general public on issues of importance.

You didn't have to accept it or agree with it, but it was always a serious piece of work. If you disagreed, you had to mount a high-quality case to contest it. When I was in government, the conclusions of Caledon research would often find their way into the Memoranda to Cabinet. When I was at IRPP, we would often look to complement Caledon's important publications with substantive research of our own. While at the University of Toronto's School of Public Policy and Governance, I often put Caledon publications in syllabi and on reading lists.

Caledon has influenced public policy in very subtle but significant ways. It put issues on the public agenda. It offered solutions. It animated the debate.

Battle, Torjman, Mendelson, and all involved should be very proud of the work they have done and the effect they have had.

MEL CAPPE

Professor, School of Public Policy and Governance, University of Toronto, and Former Clerk of the Privy Council and Secretary to Cabinet

Caledon is Canadian social policy

It is no exaggeration to say that the Caledon Institute of Social Policy is Canadian social policy. The Institute's work has informed, influenced, and directly shaped policies from minimum wages for workers, to benefits for children, to supports for the disabled.

All this, and so much more, is a proud legacy that has impacted the lives of thousands upon thousands of Canadians. Caledon – the noun – is imprinted upon social policy, and will resonate in policy conversation for decades. But I also think of the Caledon Institute of Social Policy as a way of doing social policy. Caledon – the verb – has also entered into the social policy conversation in a lasting way, a central construct of the grammar of public discourse that has left a lasting imprint upon countless academics, stakeholders, and public servants.

To do Caledon social policy is to act with empathy for the needs and concerns of Canadians whose voices are not the loudest, a direct empathy that fosters a deep knowledge of their aspirations and challenges. To do Caledon social policy is to act with just as direct and deep a knowledge of public policy, the very nuts and bolts, the details of actual programs in cities, in provincial capitals, and in Ottawa. And to do Caledon social policy is to act constructively, step-by-step, incrementally but with firm direction. It is to fill the gap between intent and result, always guided by a clear sense of destination, a vision of a society in which all Canadians have the right to become all that they can be.

Caledon has accomplished so much, and Caledon as a way of doing things will continue to accomplish so much. For this, I personally – alongside many, many other Canadians – am very grateful.

MILES CORAK

Professor, Graduate School of Public and
International Affairs, University of Ottawa

Reclaiming our humanity

There's no doubt about it. The currency of the folks at Caledon is data, statistics, and research. The result – a social policy scaffold that spans Canada. The country has benefitted from their facts, analysis, and recommendations. Even when it got lonely, they were steadying the scaffold with their bare hands. They were a policy wonk's dream. They were indispensable to my own work, particularly in the creation of the Registered Disability Savings Plan.

Despite their policy successes, I will remember Caledon most for this phrase, "The wellbeing of nations has become a numbers game." It's from *Reclaiming Our Humanity*, written in 2001 by Sherri Torjman, who, I have a sneaking suspicion, prefers stardust to statistics. She writes, "A new vision is needed because the unrelenting pressure to use more, produce more and consume more cannot be sustained. We want to counter the heavy weight of the almighty dollar. We want to build a world in which caring for and about people is a priority."

There is a design flaw in most contemporary governments. We watch with alarm as every bold vision of every party gets whittled down and rounded off once in office. In response we work to elect a new government or to reform a political party. The reality is that politicians can't lead if they have no constituency. The flaw is actually an opportunity. Fundamental government reform starts by declaring those beliefs and values that citizens hold in common. That's the constituency Caledon served with distinction.

Reclaiming Our Humanity illuminates all of Caledon's work. It inspires us to pay attention to the goodness in people's hearts. And to remember that there is nothing more powerful than data, statistics, and numbers in the hands of good people.

AL ETMANSKI

Founding partner, Social Innovation
Generation (SiG) and BC Partners for Social
Impact

Turning high quality academic research into a practical policy agenda for governments

No research organization has had a greater impact on social policy in Canada than Caledon. It has been a model on how best to turn high-quality academic research into a practical policy agenda for governments. Not every think tank can say it had a direct impact on the lives of Canadians, but I believe Caledon can and should take great pride in its ability to shape social programs that have provided much-needed support to individuals and families right across the country. I have no doubt the impact of its work will continue to be felt for years to come.

GRAHAM FOX

President and CEO, Institute for Research on
Public Policy

Major force both in bringing people with ideas around the table and in articulating significant issues

It's ironic that an event being held to mark the Caledon Institute's closure best exemplifies one of the organization's most significant roles. It seems very fitting that this fall, the Caledon Institute will be the motivation in bringing together social policy leaders for a forward-looking discussion about the next 25 years of Canadian social policy.

Thinking back over the *last* 25 years to the heyday of meaty debate about social policy issues in the 1990s/early 2000s, Caledon was a major force both in bringing people with ideas around the table and in coherently articulating significant issues – funding individuals or services, the federal role in the social union, fair taxation, equity, inequality, and much more. Significantly, the federal government was often an active participant, even convening opportunities for civil society to engage in robust debate. In this environment, the Caledon Institute was a key player in setting the tone. Today's climate of tepid social policy development and lacklustre consultation on social issues follows what was a dark decade for many of us committed to this conception of social programs.

Today old issues and new – gender, inequality and poverty, the situation of Indigenous Canadians, and more – are in serious need of well-designed social policy if Canada is to thrive. In the coming discussion, the Caledon Institute will be much missed.

MARTHA FRIENDLY

Executive Director, Childcare Resource and Research Unit

Solid, like the Canadian Shield

In the early 1990s, I chose to move back to Canada after living most of the previous seven years in the UK. I knew I was returning to a country beset by large deficits, low job creation, national disunity, and obscenely high child poverty rates. I sometimes wondered whether, in my generation, the flow of immigrants to Canada might reverse itself, and we would talk about Canadian-Italians rather than Italian-Canadians.

Shortly thereafter, I became Ottawa bureau chief of *The Globe and Mail* and met Ken Battle and Sherri Torjman. They were anything but flashy. They were solid, like the Canadian Shield, as was the Caledon Institute of Social Policy they represented. (An aside: the “of” rather than “for” in the title gave me journalistic conniptions.)

They were also substantial and not seekers of simply more status quo. They had coined the concept “welfare wall,” which made it easy to see a particular perversion in the social safety net, one that created a political wedge between welfare poor against working poor. Their credibility lay not with the social policy community per se but with its small band of innovators. And, remarkably to me, they were credible with the hard men (and they were almost all men) of the Department of Finance. That’s what you get for being creative rather than repetitive in your conception of policy. And doing your homework.

After two years of savage spending cuts to restore the fiscal sanity of the nation, the federal government was desperate to fly its Liberal colours. In the 1997 budget, it unveiled the Canada Child Tax Benefit, with much of the intellectual spadework provided by the Caledon Institute. It was the first step in the most significant social policy advance in a generation. Naturally, it was greeted with suspicion and hostility. The media was somewhat better. In a subsequent paper, Ken described its response as merely indifferent, “with the odd exception.” I like to think that by virtue of my many hours of discussion with Ken and Sherri, I made the exceptions list.

Today, we hear a lot of talk in favour of the co-creation of policy. The Caledon Institute and the National Child Benefit blazed that trail, making life better over the past two decades for millions of Canadian children.

That's a worthy laurel to rest on.

ED GREENSPON

President and CEO, Public Policy Forum

Caledon's legacy: Quality, evidence-based policy

News that the Caledon Institute is winding down its activity spurs a complex mixture of reactions and emotions on our part. First off, we are excited that Ken Battle is beginning a richly deserved “retirement” (though we hope we will still hear a lot from him). We wish him the very best and express our deep thanks to Ken and his whole team (including Sherri Torjman, Michael Mendelson, and Anne Makhoul) for the consistent and influential role they have played in Canadian social policy research and discourse for a quarter century.

But all this is, of course, tinged with regret that Caledon's contribution is coming to a close. Describing the lasting influence of Caledon's work would require an entire volume. For us, these legacies stand out.

The Caledon shop's rigorous focus on policy solutions – not just pointing out what's wrong with Canadian society, but thinking about how to fix it – led it to advance a whole suite of progressive but pragmatic ideas that have literally changed Canadian society. Ken's work on the Canada Child Tax Benefit is the most famous example, of course, but there are many others. The lives of millions of Canadians are better today, in a very concrete way, because of Caledon's research.

Our own research at the Canadian Centre for Policy Alternatives (CCPA) has helped reveal the importance of the modern Canada Child Benefit (whose lineage is traceable directly to Caledon's work). According to CCPA calculations of the living wage, the Canada Child Benefit reduces how much a working couple must earn in the labour market to meet a minimum living-wage threshold by about \$2 per hour. That's a tangible, dramatic manifestation of how important good policy is to the quality of peoples' lives; everyone at Caledon should be incredibly proud of the difference they have made.

Being evidence-driven in everything they did, Caledon was also outspoken about the need for good data. And it put its money where its mouth was, stepping up to the plate to compile and provide access to data that were essential to the whole

policy community. In some cases this meant actually doing what government should do – such as when the Harper government cancelled the National Council of Welfare, jeopardizing its annual *Welfare Incomes* report. Despite the financial and political risks, Caledon stepped in to save and maintain that vital and unique database on the inadequacy of social assistance incomes in Canada.

Caledon's legacy of high-quality, evidence-driven policy research will remain a role model for all of us working to imagine and build a better Canada. Thank you to the whole Caledon team for this rich legacy.

TRISH HENNESSY

Director of the Ontario Office, Canadian
Centre for Policy Alternatives

JIM STANFORD

Research Associate, Canadian Centre for
Policy Alternatives, and Harold Innis Industry
Professor of Economics, McMaster University

Thank you Caledon

Caledon defines the expression “punching above one’s weight.” For as long as I’ve been involved in social policy (a very long time), Caledon has been the place to go for creative, concrete, practical solutions. How to help the unemployed and underemployed. How to provide assistance to people with disabilities. How to help low-wage workers. On issues of social justice, cohesion, and fairness, Caledon has always been there, always at the forefront. When the government backed off providing data essential for designing and assessing social programs, little Caledon stepped in.

The Canada Child Benefit, helping families with children and pulling children out of poverty, is our biggest social program since Medicare. It wouldn’t exist if it weren’t for Caledon.

Most Canadians probably don’t know Caledon but they have surely benefitted from its work. I’ve had the good fortune to meet and learn from the people behind the organization. Collectively and individually, they leave an enduring legacy.

ALEX HIMELFARB

Director Emeritus, Glendon School of Public
and International Affairs, York University

Well-deserved reputation for solid research

Caledon has a well-deserved reputation for solid research that is remarkably effective in shaping public policy. One of its key contributions to social policy has been to shift social advocacy and political momentum away from universal programs such as the family allowance to programs more targeted to low-income and middle-class families. This was most notably the case for child benefits reform but was also evident in proposals for more targeted seniors' benefits that emphasized increases to the Guaranteed Income Supplement over Old Age Security. This shift towards family income testing has successfully countered low income and inequality to date. With greater targeted support, the challenge now is to sustain political support for higher levels of investment in income transfer programs.

ANDREW JACKSON

Senior Policy Advisor, Broadbent Institute

Independent and critical social policy

The Caledon Institute has contributed to Canadian social policy far beyond its small footprint in staff and resources. Its independent and critical analysis, commentary, and proposals have significantly influenced policy discourse and, in some areas, actual policies. One notable example is the Institute's work leading to the National Child Benefit System, expansion of the system over time, and ultimately the current Canada Child Benefit.

The work of the Institute has ranged widely over poverty measurement, social assistance policies, disability benefits, policies affecting seniors, use of the tax system to deliver social benefits, critique of fiscal policies, housing policies, minimum wages, and much, much more. The Institute's work has covered both broad issues of social program architecture and niche topics overlooked by other research institutions.

Under the dedicated leadership of Ken Battle and sustained over its lifetime by researchers Sherri Torjman and Michael Mendelson, the Institute has generated a steady stream of articulate, intelligible, and often penetrating work. The Institute has also drawn effectively on many other analysts of social policy in Canada. Unlike most other Canadian think tanks that on occasion address issues of social policy, the Caledon Institute has not been beholden to the interests of business, labour, rich donors, or special-interest advocacy groups.

With the closing of the Caledon Institute, one would hope that its lifetime research will be archived in a readily accessible website for the benefit of future researchers.

In short, the work and influence of the Caledon Institute will be sorely missed on the Canadian social policy horizon.

JONATHAN RHYS KESSELMAN

Canada Research Chair in Public Finance and
Professor, School of Public Policy, Simon Fraser
University

Giving credibility to policy proposals

My personal experience with the Caledon Institute originated with the social union negotiations in the mid-1990s. At the time, long before the social union became identified with a single written protocol (the Social Union Framework Agreement finalized in February 1999), the Caledon Institute in general, and Ken Battle in particular, was essential in supporting this constructive response by provincial governments to the crisis caused by the Canada Health and Social Transfer cuts. After many months of working together on a coherent proposal, provincial governments drew on both their own social welfare reforms and the ideas being disseminated by the Caledon Institute to produce the basic plan that would evolve into the National Child Benefit.

Ken Battle's 1996 Caledon commentary *National Child Benefit: An Idea Whose Time Has Come* came at a critical time. At the time, I was Premier Roy Romanow's Deputy Minister of Intergovernmental Affairs and lead provincial deputy on the social union negotiations. Up until that point, I had found it very challenging to convince my federal counterparts to take the proposal of a national child benefit seriously. We had decided to push the idea of a national child benefit at the First Ministers' Meeting on June 20 – 21 and Ken's commentary was released shortly before the meeting. I think this commentary gave our proposal credibility with the federal government that it would not otherwise have had and for this I am forever grateful.

Many social progressives and welfare activists at the time were critical of the social union negotiations. While still identifying some of the shortcomings of the version of the National Child Benefit (NCB) that was actually implemented the following year, Ken painstakingly explained the real benefits of the NCB.¹ I personally used his Caledon paper regularly to explain why we needed the NCB as well as identify areas for future work.

GREGORY P. MARCHILDON

Professor and Ontario Research Chair in Health Policy and System Design, Institute of Health Policy, Management and Evaluation, and Professor, School of Public Policy and Governance, University of Toronto;
Former Deputy Minister of Intergovernmental Affairs, 1994 – 1996, and Deputy Minister to the Premier and Cabinet Secretary, 1996 – 2000, Government of Saskatchewan;
Former Executive Director, 2001 – 2002, Commission on the Future of Health Care in Canada: The Romanow Commission

¹ Ken Battle, *The National Child Benefit: Best Thing Since Medicare or New Poor Law?* (Ottawa: Caledon Institute of Social Policy, 1997).

Setting standards and leading by example

In 2003, a few years into my career in policy, Caledon published *Nation Building Through Cities*, my paper critiquing the then government's proposed "dispersion" program of settlement for immigrants. At the time, I was the Research and Policy Manager at Maytree, having arrived at policy through my previous work as an advocate for international medical graduates in Ontario. I was, in many ways, a policy novice, and quite in awe of the policy heavyweights over at Caledon. I was immensely proud to have their support. Caledon was also firmly placed as my policy role model.

As I progressed in the field of policy, Caledon became the gold standard for evidence-based policymaking. The work was of a certain calibre. You knew a certain quality of argument would be put forward, and it was what you wanted to work toward if you wanted to work in policy. In advocacy too, Caledon led by example, proving that a relentless incrementalism could pave the way for meaningful social change; that evidence, clarity, and tenacity had no substitutes. It had policy-ready ideas, and it kept at it for 25 years. The Canada Child Benefit is testament to that resolve.

I can recall feeling intimidated sitting across the table from Michael, Ken, or Sherri. But here's what I've learned over 15 years of working with them: they are as wonderfully human as they are brilliant.

I applaud their leadership, dedication, and rigour.

ELIZABETH MCISAAC

President, Maytree

The legacy of the Caledon Institute on Canada's tax and transfer system

The Caledon Institute transformed Canada's tax and transfer system. Take child benefits as one example. From its work on the National Child Benefit and Canada Child Tax Benefit and through to the evolution of the system into the Canada Child Benefit, the advice, advocacy, and smarts of the Caledon Institute have been at the centre of it all.

The key insight advanced by Caledon's work is this: the best way to help those who are struggling is to focus our fiscal efforts first on those who are struggling. This point seems immediately obvious when stated this way. However, the notion that fiscal measures can, should, and need to be targeted to have maximum impact is still not accepted by all, with lingering opposition on both left and right. Caledon's work had an immense impact on this debate.

The core of Caledon's fiscal mission pushed toward an integrated system of tax and transfers. Where does this path lead? In my view, not toward "universal" basic income transfer schemes, in which scarce tax revenue is handed out to everyone without regard to circumstance or need. Instead, further work – tough, grinding, and slow as it may be – on integrating the tax and transfer system into a coherent whole will help many more Canadians than wasted effort chasing simplistic solutions.

From disability supports, to sales tax credits, to seniors' benefits and social assistance, there is much work ahead to simplify and focus the system, never forgetting that the goal is to provide more resources to those most in need. To the extent I have any hand in this work in the future, I know my efforts will be strongly influenced by the legacy of the Caledon Institute.

KEVIN MILLIGAN

Professor of Economics, Vancouver School of
Economics, University of British Columbia

Providing the empirical backbone too often missing in our debates

Ken Battle and his colleagues at Caledon and its predecessor, the National Council of Welfare (NCW), have been the Sergeant Friday (“just the facts ma’am”) of Canadian social policy for almost four decades. Caledon/NCW publications on topics ranging from pensions to single mothers provided the empirical backbone too often missing in our debates.

Of course, good facts do not fall fully formed from some magic tree of knowledge. They require both the analytical skills to ask the right questions and the technical capacity to answer them. Caledon/NCW brought both to the table, and earned our trust and respect as a result.

Social policy advocates are usually passionate people, as they should be. Passion however makes us vulnerable to what psychologists call “confirmation bias” and Stephen Colbert labels “truthiness:” a fact is true if it confirms my prior assumptions about how the world works; otherwise not. The upshot of confirmation bias/truthiness is policy-based evidence-making rather than evidence-based policy-making. In the current atmosphere of expanding “truthiness” and “fake news,” Caledon’s voice in the public sphere will be sorely missed.

Of course, even the best facts do not dictate policy options. Too often, we are torn between the utopian and the historically feasible. Transformative choices – identifying real utopias, if you will – require wisdom as well as knowledge. Special thanks to Ken, Sherri, and Michael – you were always wise.

JOHN MYLES

Emeritus Professor of Sociology and Senior Research Fellow, School of Public Policy and Governance, University of Toronto

Caledon's legacy: Raising the bar on social policy discourse

The Caledon Institute was created shortly before I left CMHC in 1994 to initiate a consulting career in the area of housing research and policy. Always keen to explore and examine new aspects of social policy, Ken and Sherri realized that social and affordable housing were important elements of social policy, but these topics were seldom addressed in any depth in the social policy literature and debates in Canada. Typical of their approach, they reached out to me to help build a relationship and augment their knowledge in this area of social policy. It was a pleasure to work with Sherri and Ken to develop a number of papers covering this interface over the following years.

As someone who participates in comparative international research, comparing Canada to other countries, especially the UK and US, I was struck by the absence of independent think tanks in Canada that seek to discover evidence and develop policy recommendations for government, especially in the area of social policy. Caledon quickly became a critically important presence in that Canadian void.

What set Caledon apart was its ability and expertise in separating rhetoric from sound, thoughtful analysis. Its proposals and critiques were always grounded in hard evidence and detailed analysis. It raised the bar on policy discourse and made a very substantial contribution across all levels of government and the advocacy world.

STEVE POMEROY

Senior Research Fellow and Head of Focus Consulting Inc., Carleton University Centre for Urban Research and Education (CURE)

Formidable guardians of Canadian social policy

Battle, Torjman, and Mendelson (BTM) have been formidable guardians of social policy in Canada; defenders not necessarily of existing programs or approaches, but rather upholders of cherished principles of vertical and horizontal equity, social inclusion, economic opportunity, human dignity, community capacity, and full citizenship. They have always understood that Canadian social policy is a cultural phenomenon as well as a material intervention in terms of taxes and transfers.

BTM also drew attention at times to absurdities in federal policy-making, decisions that were irrational and incongruous to the core values of social policy, whether it was boutique tax credits or a universal child care benefit that had precious little to do with child care.

They were champions, too, of more effective and responsive approaches to contemporary human needs, economic trends, and social possibilities. The necessity of modernizing programs did not deter them from encouraging debates over the future of major policies such as Employment Insurance or the Canada Pension Plan.

The work published by Caledon was always rigorous, dependable, and trustworthy. While firmly and explicitly grounded in values, the reports were never narrowly ideological or self-righteous. Instead, the work was broad-minded, open to new challenges and issues, and reformist in inclination. A Caledon paper was practically minded and also well written.

The Caledon style of policy analysis regularly meant clear expression, a focus on contemporary issues often couched in historical context, and compelling evidence. And there were the cleverly phrased titles and metaphors! These entertained but also explained some of the dynamics of budgets and social programs, whether it was the “welfare wall” or the “politics of stealth.”

Thank you so much for the legacy.

MICHAEL J. PRINCE

Lansdowne Professor of Social Policy,
University of Victoria

Michael Mendelson's contribution to Indigenous education reform

For many years, I have published on social policy, much of it via the C.D. Howe Institute. Obviously, many followers of the Caledon Institute are dubious about the C.D. Howe Institute. On one subject, however, Caledon and Howe have converged over the last decade – Indigenous education.

Michael Mendelson published important monographs on this file via Caledon, the most important his plea in 2009 for the reorganization of reserve schools into First Nation equivalents of school districts in provincial systems (*Why We Need a First Nations Education Act*).

Early in this decade, a window of potential reform opened when the Assembly of First Nations chose as its leader Shawn Atleo. Atleo is from a family of teachers and as AFN leader he acknowledged the weakness of many reserve schools and the case for reform. At the time, the minister responsible for Indigenous affairs was Chuck Strahl, a politician equally committed to education reform. The two shook hands and agreed to undertake a major initiative. Michael's call for systemic reform figured prominently in defining the ensuing agenda. (Along with two senior First Nation educators, Michael and I played a role. The four of us wrote the first detailed consultant report on what became Bill C33, The First Nations Control of First Nations Education Act.)

It is an understatement to add that Bill C33 triggered widespread opposition from many chiefs, and from the opposition parties in Parliament (Liberals and NDP at the time). Atleo resigned as head of the AFN and this reform window slammed shut – for the moment. The present government has increased reserve school funding, roughly in line with the Harper/Atleo agreement, but it seems to lack the will to address reforms required to improve school outcomes.

At some point, First Nation and non-Indigenous leaders must return to institutional reform, at which time they will hopefully read Michael's post mortem on Bill C33 (*A Second Look at the First Nations Control of First Nations Education Act*).

JOHN RICHARDS

Professor, School of Public Policy,
Simon Fraser University

Voice of reason, informed analysis, and substantive content

It is not often that there is a clear voice to provide analysis on a rapid basis for issues as they happen in the area of social and economic policy. For the past 25 years, that voice has been the Caledon Institute with Ken Battle and Sherri Torjman keeping it current, along with many of the best minds in Canada. The governments of Canada have been more and less active in their attention to social policy. From the perspective of an academic and an activist, that has made it difficult to achieve the progress towards social justice we would hope. Frequently, Caledon has been a voice of reason, informed analysis, and substantive content in a Canadian wilderness of assertion without demonstration, assumption without basis, and factual misinterpretation without shame.

If there is a ranking among think tanks, the Caledon Institute has consistently been among the best, not only in its work but in its impact. May it rest in peace knowing its work has been well done and may its descendants use it as a model and do just as well. We will need them.

MARCIA H. RIOUX

Distinguished Research Professor and
Director, York Institute for Health Research,
York University

Mastering a “triple threat” for impact

The Caledon Institute has mastered a rare “triple threat” for impact by a think tank, contributing to robust social research, supporting effective community practice, and contributing to the design and implementation of social policy.

Let me give an illustrative example of each.

In 2012, the National Council on Welfare was wound down. Its signature annual publication *Welfare Incomes in Canada* was going to disappear with it – until Caledon stepped in with an innovative crowdfunding campaign. Caledon was able to raise resources and carried on the annual data collection and reporting about social assistance rates in Canada. This ensured that the best national, statistical report on social assistance in Canada continued to be available, without interruption, for use by other researchers.

In 2002, Caledon partnered with the Tamarack Institute and the McConnell Foundation to create a network of 13 cities that set shared goals to reduce poverty, but pursue a wide range of approaches to respond to their communities’ unique needs and circumstances. Today, that network has grown to include 100 cities across Canada. Caledon has played a key role in rolling up key lessons from the network, and sharing knowledge about what was working to a much broader audience of policy-makers and stakeholders. Caledon’s work with the network has been able to identify ten different areas for community-based poverty reduction in a framework that can inform new local poverty reduction plans as well as evaluation and research about existing plans.

In 1997, the federal budget announced a new federal tax benefit for families with children. This new National Child Benefit System was designed to accelerate assistance to children in low-income families, while reaching nearly all children. The system was also designed to encourage provincial governments to invest in programs for low- and modest-income children in their province and lower the “welfare wall” for parents on social assistance. With federal increases in benefits rates and provincial re-investments, child poverty was reduced and, on a wide

range of indicators, outcomes for at-risk children improved markedly. Caledon's analysis and advice was central to the internal discussions of policy-makers on this ambitious reform. In the years since then, other governments in Canada also sought the input of the Institute – most recently in the next evolution of federal child benefits. Caledon leaves behind a legacy of policy impact that will have positively impacted the lives of millions of children in Canada. The Institute doesn't have one legacy, it has millions.

JENNIFER ROBSON

Assistant Professor, Political Management,
Carleton University

Rigorous analysis motivated by concern for the wellbeing and advancement of less fortunate Canadians

The Caledon Institute has stood out for its combination of rigorous, fact-based analysis motivated by concern for the wellbeing and advancement of less fortunate Canadians. Ken, Sherri, and their colleagues have very effectively used their heads in the service of causes close to their hearts. In doing so, they have made two types of contributions to Canadian public policy. They have provided facts, analysis, and policy recommendations that could improve social programs. They have also helped elevate the discussion. Canadians' understanding of tax and transfers, and programs supporting children, modest-income workers, people with disabilities, and the elderly is better for Caledon's contribution. Sometimes that better understanding yielded improvements to the programs themselves. Even when it did not, it invariably challenged others working in the field to expand their own knowledge and meet the same standard of informed debate. In thinking about the Caledon Institute's legacy, we will naturally think of policy impact in such areas as children's benefits and tax measures related to disability. We should also honour Caledon's contribution to Canada's culture of informed and civil debate about policy issues – a legacy that is as valuable as its substantive contributions, and that we hope will be no less durable.

WILLIAM B.P. ROBSON

President and CEO, C.D. Howe Institute

Tribute to Ken Battle and the Caledon Institute

Ken Battle and the Caledon Institute have been very important voices for progressive social policy in Canada for many decades. Through his role as President of the Caledon Institute of Social Policy as well as his earlier work as Executive Director of the National Welfare Council, Ken is unique – he combines a yearning for a better society with impressive research and communications skills, as well as firsthand knowledge of how social programs work and deep insight into the social policy decision-making process.

I believe that the Caledon Institute's most significant contribution to the country lies in the area of child benefits, where Ken and his colleagues Sherri Torjman and Michael Mendelson have for many years made the case that these benefits should be expanded. It is greatly to their credit that governments have listened to and acted upon their cogent arguments and significantly enriched child benefits programs in this country. A reduction in child poverty is one result of this enrichment.

I congratulate Ken and his colleagues at the Caledon Institute for a job well done!

ANDREW SHARPE

Executive Director, Centre for the Study of
Living Standards

Great unsung achievement: Data collection and dissemination

I believe one of Caledon's great unsung achievements is data collection and dissemination. Caledon's era coincided with an epoch that saw the demise of the Canada Assistance Plan (CAP), the downsizing of the Canadian Council on Social Development (CCSD), the scuttling of the Policy Research Initiative (PRI), and the elimination of the National Council of Welfare (NCW).

The job of collecting and interpreting important social policy data was simply left to others as the federal government conducted a wholesale abandonment of its longstanding and traditional role in the collection of information and telling Canada's social policy story. It is also crucially important to note that this dereliction was both haphazard and unplanned.

It is to the great credit of the Caledon Institute of Social Policy that it both predicted and realized that the degradation of social policy information would strike to the core of social policy research. However, rather than lamenting this loss, it leapt into the fray and began to do the essential work of creating (taking over *Welfare Incomes*) and gathering key information into a coherent array of social policy data repositories (*Canada Social Report* and *Policy Monitors*).

Caledon has done its job and made it far less difficult for the Government of Canada to resume its important role of data collection and dissemination.

Bravo Caledon!

JOHN STAPLETON

Principal, Open Policy Ontario

Consistent resource, teacher, and inspiration

Caledon has been a consistent resource, teacher, and inspiration for all its 25 years as I have moved in and out of roles that touch the many areas of social policy where Caledon's voice has been so important. Part of that of course is because of the great expertise of Ken Battle, Sherri Torjman, Michael Mendelson, and others. Caledon's ability to provide early, comprehensive, and credible evaluations of government policy and legislative proposals has greatly enriched discussion and debate within government and civil society, and among those directly touched by those proposals. More than that, Caledon has directly affected the design and content of many of the most important federal and provincial social policy reforms during its existence. For me, perhaps the best example of its skilled analysis and advocacy has been its support for income security reform that is steadily bringing so many of our children out of poverty. It has been a remarkable run and the Institute will be greatly missed.

GEORGE THOMSON

Senior Director-International, Canada's
National Judicial Institute

High quality research on key social policy issues

The Caledon Institute emerged on the policy landscape at a crucial time in Canada when other think tanks and advisory bodies such as the Economic Council of Canada were disappearing. Under the tremendous leadership of Ken Battle, Sherri Torjman, Michael Mendelson, and many others, the Institute produced high quality research on key social policy issues including welfare and minimum wage reforms, pensions and disability policy, and, my particular areas of research, fiscal federalism and early learning and child care. Moreover, the organization and its leaders helped bring about significant policy change such as in the area of children's benefits (including the National Child Benefit) and provided thoughtful and important analysis of key federal policy shifts such as the Universal Child Care Benefit.

As a researcher, I have always appreciated the Institute's attention to the complexities of policy – making in federal systems such as Canada's. The Caledon Institute stepped into the breach during a time of major national social policy reform in the early and mid-1990s and continues to produce thoughtful policy analysis to this day. I hesitate to think about what the national policy landscape would have looked like without Caledon.

As the Institute winds down its policy run, I hope that new policy leaders will rise to continue the Institute's excellent work.

LINDA WHITE

Professor, Department of Political Science
and School of Public Policy and Governance,
University of Toronto

Bringing both “insider” and “outsider” expertise

I first became acquainted with Caledon in 1995 through Ken Battle’s work with an intergovernmental committee – I was the Alberta representative – that designed and implemented the National Child Benefit. This was a difficult time as Ottawa had just cut its social transfers to the provinces. Caledon helped us find ways to come together to make federal and provincial child benefits work better to reduce child poverty and lower the welfare wall.

Caledon’s strength has been as both an “insider” and “outsider” expert on income support and social services issues, including unemployment insurance, social assistance, pensions, child benefits, tax credits, early childhood education, child care, caregiving, employment services, minimum wage, disability supports, and housing. Its “niche” experience in these very important areas was unique and deep. Its analysis of federal (and provincial) policy changes was always insightful, readable, practical, and reliable. Caledon’s work became even more critical after 2008 when it stepped forward to fill the holes caused by the government’s abandonment of even basic data collection on social assistance caseloads and incomes.

As someone who has studied in the United Kingdom and the European Union, I am amazed at the paucity of government investment in data collection, dissemination, comparative research, reflection, and dialogue on welfare state issues. While coordinating these tasks is certainly challenging in Canada’s decentralized federation – where provinces play the primary role – we seem to manage it with respect to health care. With Caledon leaving the scene, now is the time for our governments to collectively step up and invest in new institutions to improve citizen understanding of our other valued but beleaguered social programs.

DONNA E. WOOD

Adjunct Assistant Professor, Department of
Political Science, University of Victoria

Taking us far beyond relentless incrementalism

I first met Ken Battle 30 years ago, in 1987. It was a terrible year for social policy in Canada, but not as bad as what was to come. But that didn't matter. Ken just kept showing up at the "how to make things better" party headquarters.

Right from the start, Ken came across as strikingly different from the average Canadian social justice warrior. He was cunning, sly even. Disarmingly flirtatious. Irreverent. His razor-sharp understanding of both context and detail also made him a little more depressed than most of us. Turns out he had reason to be.

Ken's seeming insouciance stood out in sharp contrast to the earnestness that marked most policy advocates for the poor. But his style wasn't as memorable as his substance, including an entrepreneurial streak that was an eyebrow-raising rarity in our generation of Canadian social policy wonks. When it became clear that the Mulroney government would not countenance criticism of its policies from the National Council of Welfare, Ken assembled both the money and the people to ensure there could be a safe space for robust analysis and new policy thinking on welfare reform and poverty reduction. The Caledon Institute's influence soon started creating a new normal.

For 25 years, Caledon's unflinching trinity of Ken Battle, Michael Mendelson, and Sherri Torjman shaped the social policy thinking of students and decision-makers alike. There is arguably no other independent policy institute in Canada that can claim the same impact in the late 20th century, not just on ideas and policies, but on improving the lives of some of our most vulnerable neighbours.

Mr. Relentless Incrementalism took us far beyond relentless incrementalism. When policy reform was relentlessly focused on cuts to services and supports, and tax cuts, Ken and his Caledon colleagues were among those at the head of the parade leading us towards the idea that we could do more, not less. They shepherded the terribly-named Canada Child Tax Benefit into existence, then helped nurture its growth to provide even more meaningful support.

Not content with just thinking outside the box – let's take children off welfare! – Caledon showed us how we could build a bigger box.

From writing under a pseudonym to describe social policy by stealth, and promoting revolution (not evolution) in public policy frameworks, to reminding us of what we were fighting for and how institutional platforms mattered in that fight, Ken made his mark on Canadian social policy. Not many people can truly say that.

It has been an honour to travel this long and twisted road for decades with such a colleague and friend. He walked ahead of most of us, but not too far ahead, shining a light that showed us where the path was headed, and where we needed to go instead.

Ken, thank you for your unwillingness to go with the flow, with intelligence and humour; and for inspiring others, effortlessly, to do the same.

ARMINE YALNIZYAN

Economist

Shaping the way we talk about public policy related to poverty and inequality

From my perspective, the Caledon Institute's most important legacy lies not in the policy files it helped shape (though those are many), but rather in its distinct approach to public policy. Through a style that was consistently credible, transparent, timely, and creative, Caledon helped shape the way we talk about public policy related to poverty and inequality. It also influenced a generation of policy professionals like myself in our own approaches.

Caledon's work was always grounded in strong evidence and thoughtful analysis. A commitment to those principles ensured that its work remained credible and withstood scrutiny from across the political spectrum. In its work with governments, communities, and researchers, the Institute demonstrated the value of doing the hard work to understand the issues it engages with from multiple dimensions.

The work was transparent; Caledon always presented the assumptions behind its work and shared data so that others could draw their own conclusions. Nowhere was this more evident than in its Data Rescue initiative to preserve the *Welfare Incomes* and *Social Assistance Statistics* datasets that were abandoned by federal government decisions. These efforts and Caledon's broader body of work helped us put social policy debates in proper context.

Caledon's work was timely beyond budget round-ups and other responses to proposals of the day. It was ready to engage with issues that were not on the active political agenda so that policymakers could move forward when a political window of opportunity opened. In this approach, it demonstrated an essential role that civil society can play in policy development.

Finally, Caledon was always creative, both in understanding our public policy challenges and in proposing solutions. Through concepts like the "welfare wall" and "social policy by stealth," Caledon helped broaden our understanding of social policy.

Working with the Caledon team has been one of the privileges of my policy career. While the Institute may be winding down, its work will continue to shape policy in Canada directly, and through those of us who aspire to learn from its approach.

NOAH ZON

Director of Policy and Research, Maytree

*Highlights of
the Caledon
Institute of
Social Policy*



Foundations

In 1992 Alan Broadbent, Chairman of Maytree, and Ken Battle cofounded the Caledon Institute of Social Policy to be an independent voice committed to high-quality social policy analysis. Over the past quarter century Ken Battle, Sherri Torjman, Michael Mendelson, Melanie Burston and Anne Makhoul have used data and evidence to challenge preconceptions and craft practical social policy solutions that have shaped public policy and helped reduce poverty and inequality in Canada.



Development of Child Benefit in Canada

Given Ken Battle's work on child benefit at the National Council of Welfare throughout the 1980s, the Caledon Institute of Social Policy was ideally suited to help governments turn the idea into the reality it is today.

In 1996 support for a National Child Benefit was gaining traction but the case lacked credibility with the federal government. The policy was able to overcome that hurdle in June 1996 thanks to the Caledon Institute publishing *National Child Benefit: An Idea Whose Time has Come*, which made a clear and robust case for the benefit. By proposing that the policy be delivered as a refundable tax credit the idea became a plausible reality that the federal government could deliver. Paul Martin, then the Minister of Finance, came across Caledon's report one Sunday afternoon and immediately called Ken Battle to discuss it further.

By 1997, the federal budget announced the new National Child Benefit System. It reached almost all children and increased assistance to children on the lowest incomes. The system also

encouraged provincial governments to invest in programs that lowered the “welfare wall” for parents on social assistance. With federal increases in benefit rates and provincial re-investments, child poverty was reduced and the outcomes for at-risk children improved markedly.

Caledon’s analysis and advice was central to the internal discussions of policy-makers on the development of a National Child Benefit reform. In the years since then, governments in Canada have sought the input of the Caledon Institute – most recently in the 2016 federal budget when the Universal Child Care Benefit (UCCB) and the Canada Child Tax Benefit (CCTB) were replaced by the Canada Child Benefit further increasing the reach of financial support to parents.

Key reading

- Ken Battle (1996) *National Child Benefit: An Idea Whose Time Has Come*
- Ken Battle (2008) *A Bigger and Better Child Benefit: A \$5,000 Canada Child Tax Benefit*



Advancing our understanding of disability and poverty

Caledon’s analysis of disability led by Sherri Torjman has produced multiple reports, articles, and presentations. On this issue in particular Caledon provided much-needed insight into an issue strongly associated with poverty but often overlooked. Over the decades Caledon has shared and applied its expertise to develop and shape policy on disability benefits and support.

In 2004, Sherri Torjman co-chaired the Technical Advisory Committee on Tax Measures for Persons with Disabilities that reported to the Minister of Finance and the Minister of National

Revenue. All of the Committee's recommendations were adopted in the 2005 federal budget helping to reduce costs, primarily through the disability tax credit and the medical expense tax credit, for Canadians with a disability.

Key reading

- (2004) *Disability Tax Fairness Report of the Technical Advisory Committee on Tax Measures for Persons with Disabilities*
- Sherri Torjman and Anne Makhoul (2016) *Disability Supports and Employment Policy*



Shaping Social Security

Together Ken Battle, Sherri Torjman and Michael Mendelson have unrivalled expertise on social security systems and have used this to inform and shape how welfare in Canada is delivered. Their commitment to reduce poverty and their technical capacity for policy development gave Caledon the unique capacity to find practical ways that policy ideas can be realised through the social security system. Over the years Caledon has tirelessly sought ways to make the welfare system more effective at reducing poverty. For example:

- In 1994 Caledon provided its expertise to the Human Resources Development Minister Lloyd Axworthy's Social Security Review
- In 2004 Caledon was part of the task force on Modernising Income Security for Working-Age Adults, a precursor to the Working Income Tax Benefit (WITB)
- In 2005 Caledon evaluated the potential options and approached for what later became the Registered Disability Savings Plan (RDSP)

Key reading

- Ken Battle and Michael Mendelson (2005) *A Working Income Tax Benefit That Works*
- Richard Shillington (2005) *The Disability Savings Plan: Policy Milieu and Model Development*
- Keith Horner (2005) *The Disability Savings Plan: Contribution Estimates and Policy Issues*
- Ken Battle (under the name Grattan Gray) (1990) *Social Policy by Stealth*



Identifying the welfare wall

The welfare wall has been a reoccurring theme of the Caledon Institute's analysis. In 1993 Caledon coined the term "welfare wall" used to describe the obstacles faced by families receiving welfare when they re-enter the labour market. Over the years a key aspect of Caledon's approach has been to assess policy solutions by asking if they make the welfare wall higher or lower.

Since 1993, the welfare wall has gone from a poorly understood concept to a widely recognised social policy challenge.

Key reading

- Sherri Torjman and Ken Battle (1993) *Breaking Down the Welfare Wall*



Reforming on-reserve education

Through the work of Michael Mendelson, the Caledon Institute of Social Policy has provided Canada with the foundations to advance on-reserve education. This work highlighted the lack of progress in the educational outcomes of First Nations on-reserve residents and outlined a legal framework to improve it.

Michael further advanced this issue by contributing to a report that led to the development of Bill C33, The First Nations Control of First Nations Education Act. The Act was put on hold at the second reading but the present government has increased reserve school funding. When the opportunity for institutional reform emerges, Caledon's archive can provide the insight to take the issue forward.

Key reading

- Michael Mendelson (2009) *Why We Need a First Nations Education Act*
- Michael Mendelson (2014) *A Second Look at the First Nations Control of First Nations Education Act*



Working with Vibrant Communities

In 2002 the Caledon Institute teamed up with the Tamarack Institute and the McConnell Foundation to establish Vibrant Communities, a network of urban collaboratives committed to substantially reducing poverty through multisectoral and comprehensive local action.

The program was conceived at a meeting of leaders from the non-profit sector, people with first-hand experience with poverty, civil servants, and private sector representatives from 13 Canadian cities who were eager to explore new ways of reducing poverty. Over 8 years 13 communities experimented with new and innovative approaches to poverty reduction. Today, that network has grown to include 100 cities across Canada.

Caledon's role was to identify lessons from the network and share knowledge about what was working to a much broader audience of policy-makers and stakeholders. Caledon's work

with the network has been able to identify 10 different areas for community-based poverty reduction in a framework that can inform new local poverty reduction plans as well as evaluation and research about existing plans.

Key reading

- Eric Leviten-Reid (2007) *Reflecting on Vibrant Communities 2002 – 2006*
- Sherri Torjman (2004) *Policy Development and Implementation in Complex Files: Lessons from “Vibrant Communities”*



Data rescue

The 2012 federal budget abolished the National Council of Welfare (an advisory body to the Minister of Human Resources and Skills Development). The cut placed in jeopardy the two vital resources on the state of welfare in Canada: one, a report on the value and conditions of welfare incomes in each province and territory; the other, a report on the number of people receiving welfare payments. The Caledon Institute took over the task of gathering and analyzing this data to ensure these resources would continue. Using its determination and expertise, Caledon ensured that quality national, statistical reports on social assistance in Canada continued to be openly available, without interruption. By demonstrating the demand and value of these resources Caledon has ensured their future into 2018 and beyond with Maytree committing to updating and publishing them.

Key reading

- *Social Assistance Summaries*, 2016
- *Welfare in Canada*, 2015

Honours

- — 2000 Ken Battle is awarded the Order of Canada
- — 2004 Ken Battle receives the Saskatchewan Distinguished Service Award
- — 2011 Sherri Torjman receives the Champion of Human Services Award from the Ontario Municipal Social Services Association
- — 2012 Ken Battle and Sherri Torjman are awarded the Queen Elizabeth II Diamond Jubilee Medal

All key readings above are available to download from the Caledon archive on the Maytree website: www.maytree.com/caledon-archive

