

## *Assured Income for the Severely Handicapped Public Policy Initiative*

In the summer of 2003, staff at United Way of Calgary and Area (one of two co-convenors of Vibrant Communities Calgary) began a 20-month process to pilot a public policy initiative that would help the Calgary nonprofit sector build and improve relations with the provincial government. In short order, they assembled a working group of eight individuals from a cross-section of local organizations and formed the Calgary AISH Public

Policy Roundtable. Their purpose was twofold: to increase each organization's capacity in the development of collaborative and action-oriented government relations, and to effect positive change in an area of public policy that was important to their members. They were joined in the work by two policy consultants, an MLA and a senior bureaucrat from the Alberta Ministry of Human Resources and Employment (AHRE).

*Established in 2002, Vibrant Communities is a pan-Canadian initiative that explores promising local solutions to reduce poverty. Fifteen communities from across Canada have formed a learning partnership through which they share ideas, resources and strategies related to poverty reduction. Each of the participating communities already had done considerable work to alleviate poverty and saw Vibrant Communities as a way to extend and enrich their efforts. This story is the third in a series which highlights successful strategies for reducing poverty and building more caring communities.<sup>1</sup> For more information, visit: <http://www.vibrantcommunities.ca>*

The decision to work with government was not entered into lightly. Members of nonprofit organizations have often expressed the view that they are restricted by the Canada Revenue Agency's rule that limits spending on political activities (ten percent of revenues for large nonprofits). Government contracts can be put in jeopardy if organizations are perceived as criticizing government programs and policies, and a similar negative impact on donations can result if sponsors feel that an organization's political activities are straying too far from traditional positions. By applying a collaborative, research-based process to a policy issue, however, the participants were looking for a new, solutions-oriented approach to their dealings with government.

In September 2004, one year after the Roundtable began its policy initiative, the provincial government announced a review of the Assured Income for the Severely Handicapped (AISH) program. The announcement lent a strong push for wrapping up what had turned out to be a lengthy, intense and, at times, fractious project. The review also coincided with a provincial election, during which AISH received a great deal of media attention. Roundtable members could not have been happier: Getting AISH into the front pages and on the nightly news provided added stimulus for its improvement.

### ***Why review AISH?***

Assured Income for the Severely Handicapped (AISH) was introduced in Alberta in 1979. Originally hailed as an innovative alternative to welfare programs, it was meant to ensure a measure of dignity and financial support for people with severe disabilities who are unable to work to support themselves. In the 25 years since the program was launched, the number of AISH recipients has grown from 1,000 to 31,500. In Calgary, some 10,000 residents receive AISH benefits.

Benefit levels had not been increased since 1999. Over the past 10 years, base benefits climbed by five percent, while the cost of living went up 25 percent [Calgary Herald 2004]. Before the review, the maximum monthly benefit available from AISH stood at \$850. Recipients who were able to work could earn only \$200 a month before their AISH benefits were reduced significantly – for every dollar earned over \$200, they could keep only 25 cents. People with severe disabilities who were able to work at jobs which paid well still had to apply to AISH in order to receive assistance for disability-related medical expenses. Once on the program, these recipients were subject to the same

\$200 monthly earnings cap, creating a disincentive to employment. However, if they were able to work full time and were no longer eligible for AISH, they could continue to receive the program's medical benefits.

Some AISH recipients have said that the program is not responsive to their needs. Some have switched to Alberta Works Income Support (the province's welfare program for persons considered to be 'employable') to cover utility expenses or special dietary costs. Alberta Works has different eligibility criteria and applications for benefits must be made in person. Navigating bureaucratic waters can be rough sailing for anyone, and is particularly difficult for persons with severe mental or physical disabilities.

When the Roundtable began its work in 2003, members were told that the provincial government was keeping its eye on mounting medical costs associated with the AISH program. Currently, the government pays, on average, \$300 per month for each recipient to cover their medical expenses. Drug costs now account for one-third of the AISH budget – \$118 million in 2004-05 or double the amount paid in 1999-2000. As the population ages, more people will be applying for AISH benefits. Rising caseloads and medical costs have resulted in a five percent increase in operating costs between 2003 and 2004. The cost of providing AISH to 31,500 beneficiaries in 2004 was \$394 million. A \$10 monthly increase for AISH recipients results in a \$4 million annual expense province-wide [AISH Review Committee].

Ramona Johnston was the principal United Way of Calgary and Area employee assigned to the Calgary AISH Public Policy Roundtable. She also is United Way's lead representative to Vibrant Communities Calgary – work she shares with representatives of MCC Employment Development,

the Vibrant Communities Calgary co-convenor organization.

Says Ramona: “AISH was originally conceived as a pension program for people with severe disabilities, but the amount of support it was providing was inadequate to the task. The provincial government’s review of AISH and changes to the program have helped to redefine its role as a more complete and adequate support program for those who can not enter the workforce and a mechanism for supplementing earnings to a comfortable income level for those who are able to work.”

### *Early days*

When United Way first decided to commit to a policy development process as a means of improving government relations, Ramona met with two public policy consultants, Pam Crosby and Ian Montgomery, and with Patty Morris, Director of the Developmental Disabilities Resource Centre. Deciding which policy initiative would be the focus of the capacity-building project took very little time. In 2001, the provincial government had completed a review of its low-income programs. Partly because of disagreements over policy direction within the disability community, the province had left AISH out of the process. There was a legislated requirement to review the program by the end of 2004; the group decided to adopt AISH as its issue.

The four soon were joined by Michelle Kristinson (Multiple Sclerosis Society of Canada, Calgary Chapter), Ryan Geake (Calgary SCOPE Society – an organization which assists children and adults with development disabilities and behavioural, social or emotional challenges), Peter Johnson (Canadian Mental Health Association), Patty Morris (Developmental Disabilities Resource

Centre of Calgary), Jessica Leach (AIDS Calgary), Leslie Tamagi (The Vocational Rehabilitation and Research Institute) and Chris MacFarlane (Alexandra Community Health Centre).

Advisors were involved periodically throughout the project, including Ruth Hofer, Director, Disability Planning and Support, Ministry of Human Resources and Employment and Alana DeLong, the MLA for Calgary-Bow and, later on, a member of the Government AISH MLA Review Committee. Ruth and Alana were able to attend the initial meetings and provided important advice and information near the end of the process. Both were kept informed of the committee’s progress.

“Other nonprofit organization representatives – including Vibrant Communities Calgary – got involved in the work as their schedules allowed,” says Ramona. “Nonprofits are usually underfunded and understaffed, and our consultation process went on far longer than we originally anticipated. It was difficult for some members to continue to attend meetings after the first six months. Jessica Leach from AIDS Calgary, for example, brought a unique physical disability-focused perspective to the table which we really appreciated, but she had to leave the process after eight months due to contract constraints. Despite these types of situations, members kept up with our progress and eight organizations endorsed our final submission to the provincial government.”

The number of committee members selected was small relative to the number of disability agencies in the province. Roundtable members strove to include organizations that represented large numbers of people, and to balance physical with mental disabilities. “It was very interesting to hear all of the different perspectives during the monthly meetings,” says Ramona. “We regretted the

***Planning the work and (re)working the plan***

Though the Roundtable members did not stick with their original 10-session work plan, (they met more than 20 times), they did arrive at a policy dialogue process which they feel can be adapted for future initiatives. The order of operations is less important than the substance, however, and can be re-arranged to suit the needs of a particular group and the issue being addressed. These include:

1. ***Building collaboration*** – affirming terms of reference, mapping the process, defining success
2. ***Identifying and prioritizing key policy issues***
3. ***Identifying the decision process and points of influence*** – learning about how and when to access government
4. ***Establishing connections with policy makers***
5. ***Building support within the community***
6. ***Developing workable and acceptable solutions***
7. ***Preparing consistent messages and background information***
8. ***Demonstrating the group's influence*** – getting statements of commitment from supporters, engaging with decision makers and refining the proposed strategy
9. ***Following through*** – gathering decision maker and stakeholder responses, refining the proposed strategy
10. ***Evaluation and celebration***

fact that it was difficult to clarify expectations about timelines and work loads. Our consultants budgeted for five months of work, so when their contracts ended, I filled in the coordinator role. Without the generosity of United Way, the timeliness of the provincial election and the pressure of the upcoming review, we could easily have taken another year or two to finish the process.”

In June 2004, members invited two AISH program administrators to give feedback on the latest draft recommendations. Getting an on-the-ground perspective opened up new operational issues of which politicians and bureaucrats were not aware. For example, the AISH computer system does not flag files when medical forms are not submitted by physicians as required. Administrators now are making plans to institute a file flagging system to improve service delivery.

Says Ramona: “In hindsight, it would have been better to have invited AISH administrators into the process much sooner.” However, Ramona does not regret the Roundtable’s decision to leave AISH recipients out of the consultation process until March 2004. “We were criticized by some members of the disability community for not including AISH recipients in the committee work, but this was a deliberate decision. AISH was the subject of the effort, but our original intent was to increase organizational capacity in the area of influencing public policy. We held a consultation with the disability community in March 2004 to explain our process and progress, and it was attended by about 80 AISH recipients and service providers from across the province. They made it clear that they felt the process had not been inclusive. We learned that future work should include earlier consultation with affected groups, a mid-term meeting and the distribution of draft documents for comments near the end of the process.”

Michelle Kristinson, Manager, Government and Community Relations, Multiple Sclerosis Society of Canada, Calgary Chapter, identified another consideration for future consultations. Says Michelle: “People with disabilities have such varied needs that different groups often do not understand one another’s concerns. Physical disabilities pose far different problems from mental disabilities, for example. Our Roundtable members tried to maintain a balanced view of the many types of disabilities and their various policy implications, though our numbers were more weighted to the developmental disability side.”

### *With the end in sight*

Two weeks before members were due to give their presentation to the provincial government Standing Policy Committee on Learning and Employment on October 5, 2004, the AISH Public Policy Initiative was very nearly derailed by the reaction of two Edmonton-based disability organizations. The two groups announced that they planned to protest the group’s recommendations and its non-inclusive process. Roundtable members were taken by surprise: Both groups were involved in initial committee consultations and had received copies of draft submissions throughout the process. A representative from one of the groups had attended the March disability community consultations, and as late as August, a member of the second organization had given the Roundtable positive feedback on its work to date.

Roundtable members spent the next two weeks carefully drafting e-mails, making phone calls and incorporating as many of the two group’s recommendations as possible. In the end, both groups agreed not to protest the submission. Says Ramona: “It was very important to us that we

maintained positive relations with other groups trying to influence changes to AISH. Some of the Roundtable members have long-standing partnerships with these two Edmonton-based organizations, and we certainly did not want to see the disability community fragmented and weakened at this critical time.”

The October presentation to the provincial government was well received; Clint Dunford, the (then) Minister of Alberta Human Resources and Employment wrote a letter expressing his appreciation of the Roundtable’s proposed policy framework. Members of the Standing Policy Committee commented that it was refreshing to have people present possible solutions to a problem, rather than lists of complaints and unworkable demands. Shortly after the Alberta provincial election in November 2004, the AISH program was moved from AHRE to the Ministry of Seniors and Community Supports. The MLA AISH Review Committee’s final report to the Minister and the government’s response were released on April 15, 2005.

The Roundtable policy framework submission to the provincial government was based on five principles. Members hoped that AISH would be adjusted to:

- provide sufficient income so that AISH recipients can not only meet their basic needs but can fully participate in the family, social, economic and political life of Alberta’s communities, and thereby enjoy a lifestyle comparable to Albertans without disabilities
- help to ensure that people with permanent disabilities are able to live lives of dignity
- support people with permanent disabilities in their efforts to seek greater financial independence



- provide financial assistance tailored to the needs of persons with permanent disabilities
- work seamlessly with other support programs.

### ***How AISH looks now***

As announced in mid-April 2005, the AISH living allowance will increase immediately from \$850 to a maximum \$950 each month, and an additional increase in April 2006 will bring it to a maximum of \$1,000 per month. Government also committed to reviewing the amount every two years starting in 2007.

Government will also implement recommendations to improve the earning power of AISH recipients by increasing the employment earnings exemptions for those who work. Full exemption for employment earnings will be increased from \$200 to \$400 for singles and from \$775 to \$975 per month for couples and families. The exemption rate will be raised from 25 to 50 percent for amounts above this, to a maximum of \$1,000 for singles and \$2,000 for couples.

In addition, government will provide supplementary benefits to help cover additional medical supplies, special transportation, child care and special needs, which previously were not covered by AISH. Also accepted were recommendations on improving client services and coordinating government services provided to Albertans with disabilities.

### ***One important voice among many***

MLA Alana DeLong (Calgary Bow), an advisor to the Roundtable and a member of the Government MLA AISH Review Committee, was also a member of the low income programs review committee struck in 2001.

Says Alana: “One of the things the Roundtable members learned in a more concrete way is the fact that policy change has to percolate for a while. Changing the perceptions of 83 legislators takes time and it takes 100 small steps to effect one big one. The Roundtable submission came at an opportune moment, and its recommendations were taken very seriously, but it was one part of a larger process of building momentum and consensus. The Roundtable submission did form the basis of a government questionnaire<sup>2</sup> that was sent to 32,000 AISH clients; we received back 18,000, many of them by computer. We were able to submit our report and recommendations to the Minister in February 2005 only four months after we began the AISH policy review. Though it might appear that changes to AISH came quickly, they were really the final step in the provincial government’s low income program review which began in 2001.”

### ***Capacity building mission accomplished***

From their involvement with the project, Roundtable members gained four key insights into the process of policy development. First, they recognized the need to clarify the engagement expectations of the broader community. Though community consultation feedback was incorporated into the recommendations, the mid-process meeting did not lay out a plan for further input or endorsement of the final submission. Second, members appreciated the crucial role of timing. The community must be ready to learn the process and timing of the legislative process and be ready to provide solutions at the appropriate moment. Third, Roundtable members learned that it is critically important to engage key bureaucratic and political policy-makers at the beginning of the process, to keep them involved and to regularly invite feedback.

Fourth, it was important to let the Minister know that his staff had been supportive of the project. Says Ramona: “We continually informed the government of how appreciative we were that this was a collaborative process. When we presented our recommendations to the standing committee, this appreciation was reflected back to us.”

Government representatives appreciated the opportunity to hear the community’s perceptions of AISH. Says Roundtable advisor Ruth Hofer, Director, AISH Program and Policy, Ministry of Seniors and Community Supports: “The work of the Roundtable definitely influenced the government’s decision-making process. Because this coalition represented a wide variety of agencies, its recommendations were listened to very carefully. The group validated the issues regarding the AISH program that had previously been identified as requiring attention, so its input reinforced the need for change.”

The Calgary AISH Public Policy Roundtable has been deemed a success by its participants. Says Michelle Kristinson of the Multiple Sclerosis Society: “This has been a very rewarding and positive experience – something to build on.” The experience of working with the government in an advocacy role confirmed for all the benefits of approaching government with the aim of building positive, collaborative relationships. After their October submission, Roundtable members received many letters of support and requests for assistance from other organizations as they prepared their own submissions for the AISH review. The Adult Congenital Heart Clinic, for example, submitted a three-page response that referenced the Roundtable’s policy framework throughout.

From her government perspective, Ruth Hofer was pleased to learn more about community

perceptions of AISH. Says Ruth: “Issues raised by community organizations that work with AISH clients were very valuable. Though the Roundtable was focused on larger policy recommendations for the program, we identified many smaller policies that needed adjustment as well. This type of dialogue is extremely beneficial.”

The Roundtable members themselves were also impressive. Ruth continues: “These individuals presented themselves with integrity, commitment and honesty. They were candid about not



*Roundtable members (left to right) Michelle Kristinson, Leslie Tamagi, Ryan Geake and Peter Johnson outside the provincial legislature in Edmonton on Oct 5, 2004 following their presentation to the Standing Policy Committee.*

having a history of being able to trust government and their perception that perhaps the government didn't trust them. We were able to quickly get down to the issues of how to build capacity, how to build collaborative relationships, who the decision makers were and how the process worked. My department now sees this group as a key stakeholder with whom we can consult in future, likely on an issue-by-issue basis. For example, we have already discussed with them how to best communicate changes to AISH that came out of the review as well as how to implementation issues related to some of the recommendations."

### ***Onward and upward***

Vibrant Communities Calgary has moved into the third phase of its work and is one of six "Trail Builder" communities.<sup>3</sup> Over the next few years, it will focus upon three key areas: promoting economic well-being and progressive workplace practices; reducing policy and procedural barriers; and raising public awareness and encouraging civic engagement. United Way of Calgary and Area, as co-convenor of Vibrant Communities Calgary, will bring its increased capacity in the development of public policy and collaborative government relations to this work.

Says Ramona Johnston: "Vibrant Community's process of establishing regular policy dialogues with representatives of the federal government informed and validated our work on reducing AISH policy barriers. In particular, it demonstrated the importance of developing a team approach to a common problem, in which government representatives are kept informed of progress and encouraged to take ownership of the work and its outcomes."

Ramona will bring her knowledge and experience from the AISH policy initiative when she formally joins Vibrant Communities Calgary as its Manager in June 2005. Organizers are already hard at work on a second area where they will apply the policy development lessons of AISH.

Fair Fares is a joint project initiated in 2000 by the City of Calgary as an outgrowth of work undertaken by its Persons with Developmental Disabilities Transportation Committee. Its goal is to develop a discounted transit pass for low-income Calgarians. United Way and the Disability Action Hall Calgary SCOPE Society joined the committee in 2002. In October 2004, project organizers agreed that there were mutual benefits to be realized by forging a strategic partnership with Vibrant Communities Calgary. As with the AISH Roundtable, the group will make it a priority to work very closely with both the administrative and political sides of government, maintaining constant communication in order to ensure that participants feel closely connected to the process.

Says Ramona: "United Way's increased capacity in the area of government relations will have a flow-through effect for Vibrant Communities Calgary. It will help direct the initiative's approach to lobbying and advocacy and how we conduct networking and community relations activities. Long-term policy changes lie at the heart of reducing poverty and encouraging the development of caring communities, and we are very pleased that this first foray into policy formation has been such a success."

*Anne Makhoul*



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#### Endnotes

1. Other stories in this Vibrant Communities series include:
  - *Waterloo Region’s Guaranteed Income Supplement Campaign* (January 2005)
  - *Quality of Life CHALLENGE in Victoria Invites Low-income Canadians to Speak for Themselves* (April 2005)
  - *Community Action in Saint John: Making a Difference in the Lives of Young People* (May 2005)
  - *The Living Wage Learning Initiative* (May 2005).
2. For more information on the AISH review, MLA Committee recommendations and program changes, visit: <http://www.aishreview.gov.ab.ca>
3. The Trail Builders are active members of the Pan-Canadian Learning Community who are ready to implement strategic, well-planned poverty reduction initiatives. Trail Builders receive extra financial and coaching support based on a well-developed community plan rooted in extensive consultation and partnership building at the local level. Once a Trail Builder proposal is approved, the community receives targeted funding support from the J.W. McConnell Family Foundation for up to three years which matches funds already raised locally. As part of their commitment, Trail Builders establish measurable targets they expect to achieve during the life of their project. Collectively, the Trail Builder communities are expected to

help at least 5,000 Canadian families move out of poverty, and build supportive partnerships with 250 community organizations, 100 businesses and 100 low-income leaders. Currently, six communities have achieved Trail Builder status (BC Capital Region, Niagara Region, Saint John, Edmonton, Saint-Michel and Calgary).

#### References

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