

1974  
DEC.

Report of Study on Edmonton Social Planning Council  
& United Way of Edmonton & Area Relationships

Terms of Reference

The desire for the study arose when several members of the Board of Directors of the United Way of Edmonton and Area were approached by citizen donors expressing their concern regarding some of the activities of the Edmonton Social Planning Council and questioned whether or not the United Way should be funding this agency. It was requested that the study be made in November 1974 with a view to concluding it by the end of January 1975.

The scope of the study was as follows:

- a) To examine the programs and services which have been provided by the Edmonton Social Planning Council from the period 1970 to the present time.
- b) To examine the manner in which various Social Planning Council programs, briefs, seminars, workshops etc. have been financed during this period.
- c) To gather information on how the Social Planning Councils are funded in Vancouver, Winnipeg, Toronto, Hamilton, Ottawa, London & Halifax.
- d) To prepare recommendations for the United Way Board of Directors concerning alternative methods of funding the Social Planning Council:
  - i) whether or not the United Way should continue with the present method of funding,
  - ii) whether or not the Edmonton United Way should enter into a purchase-of-service arrangement with the Edmonton Social Planning Council whereby certain studies or projects would be financed on a program or project basis; and if so should indicate the nature and types of programs which would be properly funded by the United Way,
  - iii) whether or not the Social Planning Council should seek alternate sources of funding and if so, indicate desirable sources of such funding.

The Study Method

The undersigned read a substantial sampling of reports published by

the Social Planning Council in the past three years. These are listed in Appendix I. He conferred during the week of November 3rd with approximately 25 people in Edmonton who were representative of the Social Planning Council, the United Way and other interested people, particularly United Way social agencies, a representative of organized labour, etc. These are listed in Appendix II. In addition, he was provided with Statements of Purpose of the Social Planning Council dated 1972 and of the United Way dated 1971. The 1972 approved Objects of the Social Planning Council were compared with the Objects as approved in 1957 and 1940.

Comparative information was obtained from other Social Planning Councils across Canada, notably the Social Planning Council of Metropolitan Toronto and the Ontario Welfare Council, the latter particularly in respect of information about government grants to Social Planning Councils. However, the basic judgements which were applied to the information thus obtained stemmed from the writer's long experience in United Way and Social Planning Council work in Canada and the United States, particularly as Executive Director of the United Way of Ottawa & Region, the Executive Director of Community Funds & Councils of Canada and Executive Vice President of the United Way of Metropolitan Toronto.

#### Objects of United Way & Social Planning Council

The 1971 Statement of Basic Purpose of the United Way of Edmonton & Area, although brief, is an excellent document which if implemented puts the United Way of Edmonton in the leadership of United Way organizations in Canada. The following is particularly impressive:

"To provide leadership to the private sector of greater Edmonton in a recognition and determination of social inequities, to determine the priorities of these inequities and co-ordinate voluntary efforts to deal with them; to plan and fund....to meet new and emerging needs....to constantly review existing agencies to insure continuing relevance, improve services and increase efficiency."

The Social Planning's 1972 Statement of Objects seems entirely too general and too briefly stated in consequence of which almost anything can be done under them, as follows:

"The Edmonton Social Planning Council is an agent for social change and development.

An objective of the Organization is to develop and maintain a voluntary non-governmental capability for informed decision making and action.

The Council provides resources to initiate and also to support efforts through which citizen plans can be developed and implemented."

Apart from their generality as noted above, the objects are in line with what progressive Social Planning Councils across Canada have been trying to do in recent years. However, the objects might have included some of the sound ones which were approved in 1957 as follows:

- "1) to facilitate co-operation among all welfare, health and recreational services in the community.
- 2) to facilitate co-operation of organizations in planning their work to meet the social welfare needs of the community, present and future.
- 3) to facilitate co-operative action in matters of social welfare improvements and the development of an informed public opinion on social welfare problems.
- 4) to study existing services and recommend methods of improving, extending and preventing duplication of services."

Presumably these latter objects were taken on by the Planning Department of the United Way when it was established about five years ago when the Social Planning Council underwent major changes in personnel and activities. The Council's 1972 Statement reflects the change in program emphasis and in the nature of the Board and staff, that is to say, the Social Planning Council has emphasized community development and research

in the areas of urban design and transportation, with less emphasis on social services planning or what might be better termed human care services planning. The rationale for this new emphasis has been that the citizen and community groups, which the Social Planning Council has been trying to help, have expressed strong desires for help in these areas and presumably the Council felt that the established social service agencies were sophisticated and strong enough to do their own social planning.

The Ontario Welfare Council notes that Social Planning Councils in Ontario share these common objectives:<sup>1</sup>

- "a) to facilitate citizen participation in the making of decisions on social issues and the provision of services;
- b) to act as an independent social researcher and social critic, to set forth alternatives for policy and action and to advocate specific solutions and reforms;
- c) to promote and facilitate co-operation and co-ordination within the voluntary sector and between the voluntary sector and government."

The Social Planning Council of Metropolitan Toronto suggests these objectives:<sup>2</sup>

- "a) to help facilitate the participation of citizens in the making of decisions on social issues and in the provision of community services;
- b) to set forth alternatives for action on social problems and to advocate specific solutions and reforms;
- c) to promote for those persons unable to obtain it for themselves access to goods, services and opportunities on a level not of mere subsistence but of social functioning and well being;

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1) Ontario Welfare Council, Voluntary Social Planning in Ontario, Toronto, 1974, p. 1.

2) Social Planning Council of Metropolitan Toronto, George Hart, Executive Director, "Future Direction & Dimensions", Toronto 1974, p. 2.

- d) in the area of citizen participation, social issues and services, to act as an independent researcher, a repository of knowledge, an informer of the community, and a critic."

It is recognized that local social planning councils vary in their objects and activities in accordance with varying local needs, size of city, etc. But the foregoing quotes, especially from the Ontario Welfare Council, represent common denominator objectives of some 40 Councils in the province of Ontario.

### Current Activities

In fairness to the Social Planning Council it should be noted that most of the progressive Social Planning Councils across Canada have moved in the direction of helping community based groups but they have not gone as far as the Edmonton Social Planning Council. As well, they have reserved some staff time and organizational energy for human care services planning and research, have maintained ties with the established social agencies and have continued to meet the social planning needs of their parent United Way Organizations.

The foregoing development in Edmonton was extreme in 1970, but it appears that the pendulum is now swinging back to a more balanced approach to social planning, although there is still much concern with the social aspects of physical planning which is more properly the financing responsibility of the city of Edmonton and perhaps the province of Alberta, rather than the United Way of Edmonton & Area.

The reports published by the Social Planning Council in recent years are on the whole impressively sound and helpful to the community. They certainly merit community support, both from voluntary funds and tax funds. Indeed, the investment of United Way dollars in Social Planning Council work is a very creative use of voluntary dollars since it expands their effectiveness beyond the voluntary sector to influencing government decision making which affects many more people than the limited voluntary dollars are able to do directly.

### Structure

The Board of Directors of the Social Planning Council appears to be representative mainly of urban reform people and seems to lack representativeness, especially from the business community, organized labour and the established agencies. The Board members are dedicated and hard working, participate actively in the preparation of reports and have shown remarkable productivity with such a small staff and budget. The reports seem to have a limited circulation, for example, the Board of Directors of the United Way do not receive them nor do the established agencies. The reports tend to give the Council a high profile in areas which are not representative of United Way interests. There is thus a tendency to overlook the less publicized reports which are concerned with health and welfare, the physically handicapped, etc.

The Social Planning Council has experimented with a horizontal administration with three co-chairmen and a chief co-ordinator who takes the place of an Executive Director. This limits accountability and seems to give the staff, who appear to be young, idealistic and inexperienced, too much leeway in making policy decisions which should be the prerogative of the Board and the responsibility of the Executive Director to carry them out. It is understood that the three-headed co-chairmen have now been replaced with a single chairman or president and this should improve the situation. However, the chief co-ordinator should have all the responsibilities and powers of an Executive Director and this is not the case at the present time, so that he is not able to exercise control and accountability for staff activities.

### Citizen Groups & The Voluntary Sector

The result has been that the Council has emphasized activities which are generally considered to be unrelated to United Way financing responsibilities and would appear to belong to government responsibility for

helping to maintain a voluntary citizen-based planning capability. But Councils across Canada are dependent for much of their funds on United Way money. The Edmonton Social Planning Council is thus in danger of weakening itself by cutting off its chief financial support and thus lose the opportunity to effect social change which is an important and desirable part of its objects.

One particularly important issue which Edmonton, like all other Canadian cities face, is the under-financing of voluntary services. This should be a major concern of the Social Planning Council, which should be expressed in close collaboration with the established voluntary agencies of the community.

The Edmonton Social Planning Council seems to be following the pattern of the Social Planning Council of Montreal which has devoted itself primarily to helping citizen groups resulting in the United Way of Montreal financing it through selected project grants. However, the Montreal Council has had access to federal money for innovative and other special projects, a source which does not appear to be available as readily to the Edmonton Social Planning Council.

It is important to emphasize that Councils across Canada have been less concerned with the established agencies in recent years and have been doing more work directly with the exploding citizen groups that have emerged in the past few years. These new groups want a voice on a whole range of social situations and conditions. Some are middle class groups which are interested in pollution and physical planning. These can certainly survive more readily than the low income groups representing the vulnerable parts of the population which tend to have a high mortality rate in spite of government help in the form of Opportunities for Youth Grants and Local Initiatives Projects Grants. These latter groups need the help of the Social Planning Council and certainly the Edmonton Social Planning Council deserves a great deal of credit for providing them with assistance.

### Research & Advocacy

The Council's research has been of a fairly high calibre as evidenced in most of their reports, but they have tended to take an advocacy approach on every issue with which they become concerned. This is not necessary by any means, particularly where the subject matter is urban design or transportation, such as the Commonwealth Games Stadium and access roads to it. The Council's reports should suggest alternative courses of action with a view to compromise solutions although they could also articulate a particular position and advocate for it, particularly in health and welfare matters.

The Council would have a better image with the United Way if it adopted a more neutral stance, or perhaps a less militant stance, by letting the citizen groups that are served initiate action with the research and fact gathering information produced by the Council. This can be accompanied with office help and advice to low income groups on how to be heard by the decision makers.

It is perhaps not generally understood that the Social Planning Council has been actively involved in such important health and welfare issues as standards of living, food allowances, health issues, the needs of the handicapped, etc. But apparently the mass media does not select these for public discussion and tends to play up the more controversial subjects in the area of physical planning.

But if the Council insists on always maintaining a high profile, especially in areas which are not of direct concern to the United Way and its contributors, then it should seek more financing from the city of Edmonton and perhaps the province of Alberta.

### Relations With the United Way & Government

There is evidence of over-reaction by United Way leaders and contributors, especially from the business community. This danger cannot be disregarded since some 80% of United Way money comes from corporations, their



executives and employees and hence it is very vulnerable to criticism from their givers. This is not to say that the United Way should not support the Social Planning Council in areas of correcting inequalities in Edmonton's social services and as well, when there are clear social implications in issues of physical planning. Such a stance is included in the United Way's 1971 Statement of Purpose.

The United Way of Edmonton & Area found it necessary to set up a planning function within its own administrative structure a few years ago. There seems to be a lack of clarity between the United Way's own planning function and that of the Social Planning Council. There are examples of excellent Social Planning Councils which are combined in a single administrative structure with the United Way, but these are more popular in small communities which are otherwise unable to finance an independent Council, with some notable exceptions such as Vancouver, Windsor and London. The Social Planning experience in recent decades suggest the advisability of a separate Social Planning Council for large cities, with close working relationships with the United Way, such as exist in Toronto, Ottawa, Hamilton and Winnipeg.

Reference was made to the substantial dependence of Social Planning Councils on United Way funds. Governments have been reluctant to support the core budgets of Social Planning Councils, although they have provided increased funding for special projects in recent years. The government stance is continuing to undergo change in favour of more substantial core financing of Social Planning Councils. Thus in Ontario for example, several municipal governments have increased their grants to Social Planning Councils as follows:

Financing of Selected Social Planning Councils in Ontario, 1974<sup>1</sup>

<u>City</u>	<u>Operating Budget</u> <u>Dollars</u>	<u>Local Government</u> <u>Allocation - Percent</u>
Guelph	36,399	50

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1) Voluntary Social Planning in Ontario, Ibid, Appendix A

Hamilton	154,260	13
Kitchener-Waterloo	58,647	85
Niagara	47,000	100
Oakville	21,000	55
Ottawa	236,796	24
Sarnia-Lambton	23,450	66 2/3

This suggests that the city of Edmonton's \$12,000 grant to the Social Planning Council is inadequate and serious consideration should be given to providing a substantially increased annual grant. There is even more justification for such action in Edmonton than in other cities, having regard to the Social Planning Council's substantial interest in matters of municipal and provincial government concerns in recent years.

It should be noted that the United Way is not over-financing social planning in Edmonton. The Canadian average of United Way Allocations approximates four percent of campaign results, which for Edmonton would be approximately \$80,000. It appears that Edmonton is close to the national average with a \$60,000 allocation to the Social Planning Council. However if one considers the expenditure of its own planning department the total would approximate four percent.

If the Social Planning Council's emphasis of the recent past in urban design and transportation continues to be a major facet of its activities then the United Way should assist the Council to get a larger portion of its funds from a city and provincial grant.

#### Provincial Planning

There seemed to be a need for a citizen-based voluntary social planning council serving the Province of Alberta such as obtains in British Columbia and Ontario. The Edmonton Social Planning Council appears to be meeting this need in part, especially when it deals with matters of health and welfare. Key decisions are made at the provincial level where a partial

vacuum exists in terms of the need for citizen-based research and social action. It would be desirable for all the United Ways and the Edmonton Social Planning Council in Alberta to get together to form such an organization. It should be financed by a substantial provincial government grant in addition to United Way allocations. Leadership for such an undertaking should come from the United Way of Edmonton and the Edmonton Social Planning Council.

### Recommendations

While there are probably a variety of financing options for the Social Planning Council which could be considered by the United Way, the three main ones appear to be the following:

- 1) A continuation of global or deficit financing as at the present time.
- 2) Project financing, that is, the Social Planning Council making an annual submission of the projects it intends to carry out in the ensuing year with a price tag placed on each project; and the United Way selecting those which it believes are congenial with its own priorities.
- 3) Invite the Social Planning Council to become a partner of the United Way like the Red Cross. Option three, however, would offer no help to the United Way, particularly in its fund raising posture, since the Social Planning Council does not have the kind of fund raising muscle which the Red Cross has.

The writer would recommend that option number one should be favoured by the United Way, mainly because it provides the Social Planning Council with greater flexibility to shift gears to meet emerging needs and social problems in such a fast changing community as Edmonton. However, the United Way would be justified in placing conditions on the Social Planning Council for continued deficit financing as follows:

- 1) Reorganization of its Board of Directors so that it is more representative of the general community (business, organized labour and established agencies). Cross-representation between United Way and Council Boards should be re-established.

- 2) Prohibit paid staff from exercising a vote on the Board of Directors - this should apply to all United Way agencies.
- 3) Hire an experienced staff person with credibility to help the executive director exercise leadership in the community, particularly with the established agencies and especially in the area of under-financing of voluntary services, suggesting a need for more government financing of established services.
- 4) A greater balance in the selection of planning activities with more emphasis on health and welfare.
- 5) The Social Planning Council, with the help of the United Way, should seek a substantially increased city grant for its core budget.
- 6) Consider disbanding the United Way's own planning department with a full mandate to the Social Planning Council providing they change their priorities and staff.

If the foregoing conditions seem reasonable to the United Way but are unacceptable to the Social Planning Council, then option two should be considered, that is, project financing which is essentially a purchase of service arrangement between United Way and Council. Under this arrangement, the United Way should feel free to submit projects to the Council on a purchase of service basis, and should also consider strengthening its own social planning capability.

Respectfully submitted

Henry Stubbins,  
Study Director.

December 1974.

## APPENDIX I

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## APPENDIX II

### Persons Interviewed in Edmonton, November 3rd to 7th, 1974

Mrs. D. B. Mintz, Executive Director, Jewish Family Services of Edmonton.  
D. K. Wass, Director, Edmonton City Social Services.  
Edmonton Social Planning Council Executive Committee & Staff.  
Dr. Walter Johns, University of Alberta.  
Donald Storch, Executive Director, Family Service Agency of Edmonton.  
Dr. Elsie McFarland, University of Alberta.  
Mrs. Leslie Bella, Social Planning Consultant, Edmonton.  
William Mack, Amalgamated Transit Union.  
Hugh Harvey, Executive Director, United Way of Edmonton & Area.  
Gerry Wright, University of Alberta.  
D. Stolee, Deputy Minister, Department of Health & Social Development; Alberta  
Government.  
Mrs. Margaret Williamson, Executive Director, Y.W.C.A., Edmonton.  
Mrs. Alice Hanson, Boyle Street Community Services Co-operative.  
Stewart Bishop, United Way of Edmonton & Area.  
Father Irwin, Executive Director, Catholic Charities of Edmonton.  
Robert Armit, Chairman, United Way Allocations Committee.  
Ms. Sandy McKema, Boyle Street Community Services Co-operative.  
Ms. Deloris Russell, Planner, Edmonton Social Planning Council.  
Barry Gilles, Edmonton Social Planning Council.  
Dr. Bernard Snell, Executive Director, University of Alberta Hospital.  
Peter Boothroyd, Chief Co-ordinator, Edmonton Social Planning Council.