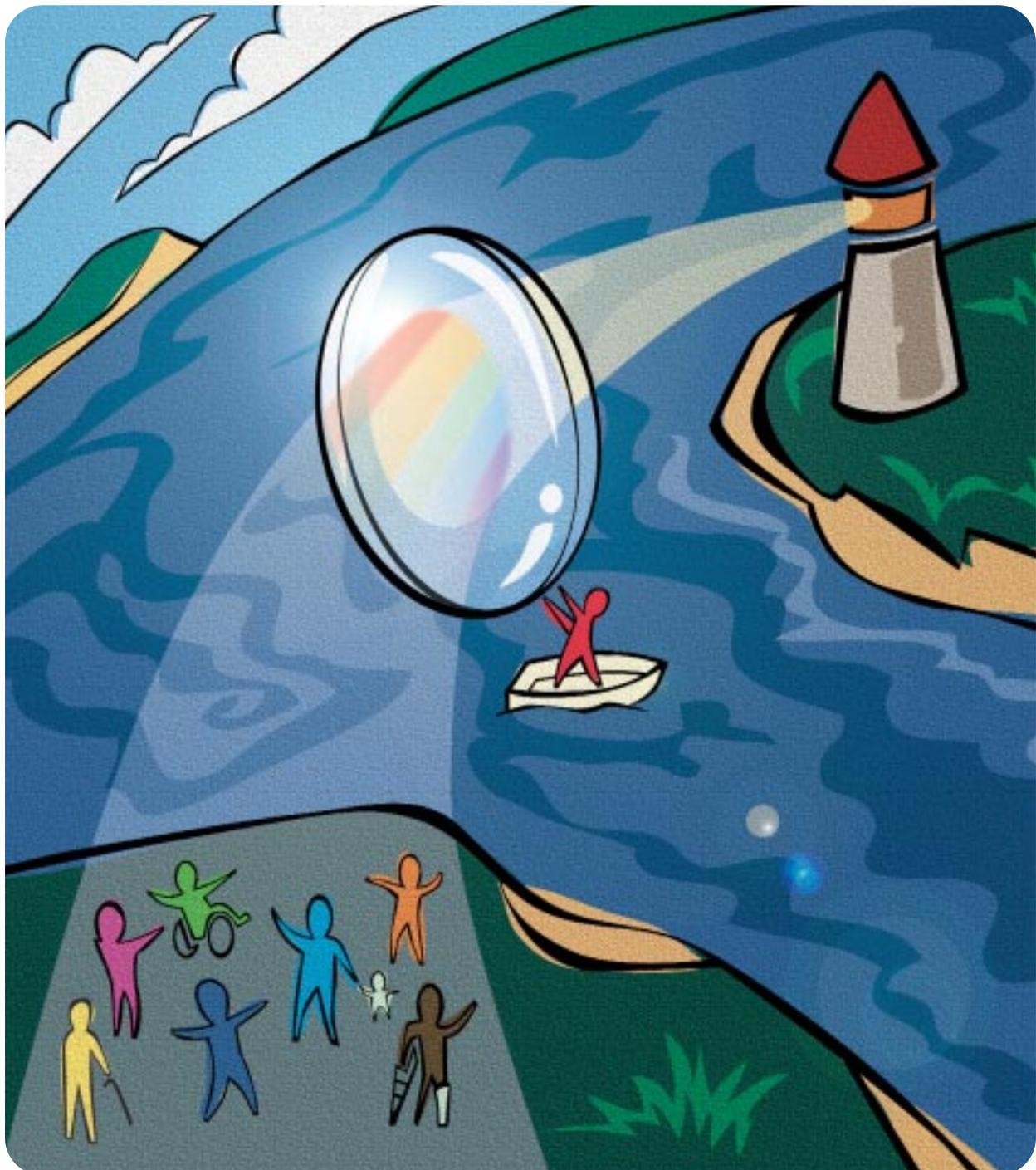




An Inclusion Lens

Workbook for Looking at Social and Economic Exclusion and Inclusion



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An Inclusion Lens

Workbook for Looking at Social and Economic Exclusion and Inclusion

WHAT ARE SOCIAL AND ECONOMIC INCLUSION?

Inclusion is a term that is familiar to most people in their everyday lives. We feel included, or excluded, from family, neighbourhood, or community activities. Inclusion and exclusion have also been recognized as social issues in Europe since the 1970s, where it has become a central feature of public policies.¹ In Atlantic Canada, social and economic exclusion and inclusion have recently become the focus of attention among those who are concerned about poverty and its many negative effects on people:

Those who are excluded, whether because of poverty, ill health, gender, race or lack of education, do not have the opportunity for full participation in the economic and social benefits of society.²

WHAT IS AN INCLUSION LENS?

A lens is an aid to improve vision. It can also provide a new way to look at the root causes of old problems, like poverty, discrimination, disadvantage, and disability. The term “Inclusion Lens” used here is a shorthand way of looking at social and economic exclusion and inclusion. The Inclusion Lens is a tool for analyzing *legislation, policies, programs, and practices* to determine whether they promote the social and economic inclusion of individuals, families, and communities. It will open up minds to new ways of thinking and open doors to new solutions for old problems. Ultimately, it provides a new way to encourage change that will transform society.

The Inclusion Lens is designed for use by policy makers, program managers, and community leaders who work in the context of social and economic exclusion, in both the public and non-profit sectors. It will also be a tool for activists in

social movements, such as women and people with disabilities, and community developers working toward healthy, sustainable communities. It provides a method for analyzing both the conditions of exclusion and solutions that promote inclusion. It also provides a way of beginning to *plan* for inclusion.

WHY IS SUCH A TOOL NEEDED?

Social and economic exclusion and inclusion have emerged as new ways of understanding poverty and disadvantage, and their impact on health and well-being, by creating a shared understanding across sectors and *jurisdictions* as the basis for action. One of the overarching objectives of the Population and Public Health Branch, Atlantic Regional Office, Health Canada, is to influence the development of healthy public policies and programs which address the determinants of health and which promote social and economic inclusion. (See Appendix 2 for more information about the determinants of health.)

Strategies to promote social and economic inclusion call for actions that respond to individual, family, community, and societal concerns. Complex problems require complex solutions. Action is required from many sectors of society to address the *systemic* nature of exclusion.

Policy makers need tools and methods to create public policies that are inclusive. These tools help them translate the *concepts* of social and economic exclusion and inclusion into concrete terms that can then be fed into the public policy development process.

The Inclusion Lens provides a way to begin the dialogue with excluded groups, raise awareness about how exclusion works, and identify steps to move toward policies, programs, and practices that will be inclusive.

HOW CAN THE INCLUSION LENS BE USED?

This new tool may be used in a variety of *settings* to analyze the conditions that exclude people, communities, and populations from participating in the social and economic benefits of society in Atlantic Canada.

1. **Governments** at all levels can use the Inclusion Lens to analyze legislation, policies, and programs to determine whether these exclude or include people who are marginalized, disadvantaged, impoverished, or discriminated against.
2. **Non-government organizations** can use the Inclusion Lens to find out if the policies, programs, and practices they use exclude or include people in vulnerable situations.
3. **Community groups** can use the Inclusion Lens for *planning, development,* and social action to address the sources of exclusion in communities and in public policies, and pointing toward solutions that will be inclusive.

VALUES: THE FOUNDATION

The Inclusion Lens needs a foundation of values to guide how it is used. These values arise from the work that has taken place in Atlantic Canada on social and economic exclusion and inclusion:

Social Justice.

Distribution of the social and economic resources of society for the benefit of all people.

Valuing Diversity.

Recognition and respect for the diversity of cultures, races, ethnicity, languages, religions, abilities, age, and sexual orientation; valuing all contributions of both women and men to the social, economic, and cultural vitality of society.

DIMENSIONS OF EXCLUSION AND INCLUSION

Social and economic exclusion and inclusion can be seen along several *dimensions* – **cultural, economic, functional, participatory, physical, political, structural, and relational**. These are illustrated in Figure 1 on page 4. There are many elements to exclusion and inclusion that should be considered in analyzing a policy, program, or practice. Figure 2 on page 5 illustrates these

elements in relation to the eight dimensions of the Lens. It is not intended to be a complete list, but to stimulate readers to think about which of these may apply to their particular situations. Some of the elements may relate to more than one dimension. Additional elements may also be identified.

FOR INCLUSION

Opportunities for Choice.

Respect for the right of individuals to make choices that affect their lives.

Entitlement to Rights and Services.

Recognition of universal entitlement to rights and services as set out in human rights covenants, charters, and legislation.

Working Together.

Building common interests and relationships as the basis for actions to achieve shared goals.

Readers are encouraged to keep these values in mind when using the lens.

THE INCLUSION LENS

Elements of exclusion

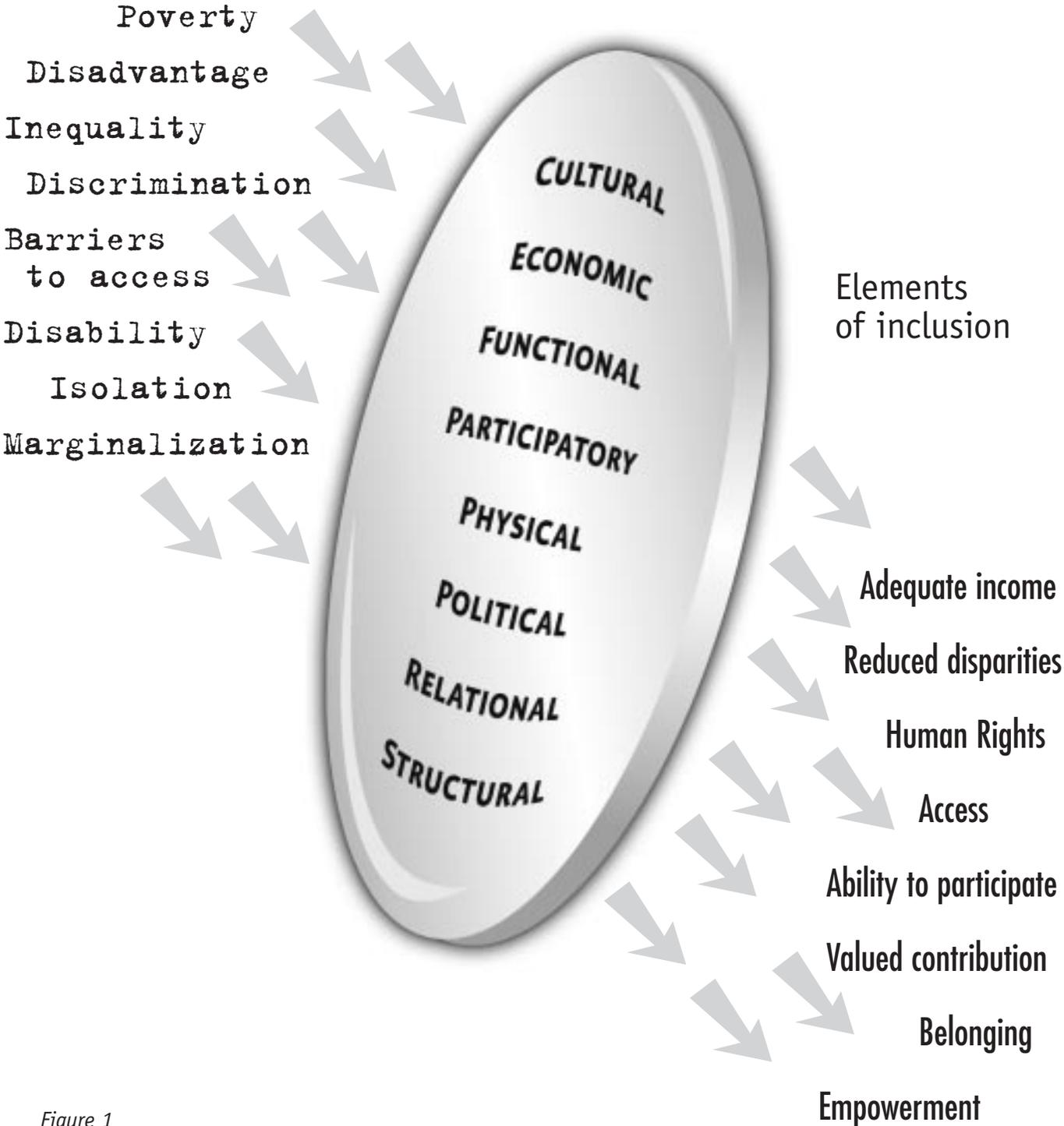


Figure 1

ELEMENTS OF EXCLUSION	DIMENSIONS	ELEMENTS OF INCLUSION
Disadvantage , fear of differences, intolerance, gender stereotyping, historic oppression, cultural deprivation.	CULTURAL	Valuing contributions of women and men to society, recognition of differences, valuing diversity, positive identity, anti-racist education.
Poverty , unemployment, non-standard employment, inadequate income for basic needs, participation in society, stigma, embarrassment, inequality, income disparities, deprivation, insecurity, devaluation of caregiving, illiteracy, lack of educational access.	ECONOMIC	Adequate income for basic needs and participation in society, poverty eradication, employment, capability for personal development, personal security, sustainable development, reducing disparities, value and support caregiving.
Disability , restrictions based on limitations, overwork, time stress, undervaluing of assets available.	FUNCTIONAL	Ability to participate , opportunities for personal development, valued social roles, recognizing competence.
Marginalization , silencing, barriers to participation, institutional dependency, no room for choice, not involved in decision making.	PARTICIPATORY	Empowerment , freedom to choose, contribution to community, access to programs, resources and capacity to support participation, involved in decision making, social action.
Barriers to movement, restricted access to public spaces, social distancing, unfriendly/unhealthy environments, lack of transportation, unsustainable environments.	PHYSICAL	Access to public places and community resources, physical proximity and opportunities for interaction, healthy/supportive environments, access to transportation, sustainability.
Denial of human rights , restrictive policies and legislation, blaming the victims, short-term view, one dimensional, restricting eligibility for programs, lack of transparency in decision making.	POLITICAL	Affirmation of human rights , enabling policies and legislation, social protection for vulnerable groups, removing systemic barriers, will to take action, long-term view, multi-dimensional, citizen participation, transparent decision making.
Isolation , segregation, distancing, competitiveness, violence and abuse, fear, shame.	RELATIONAL	Belonging , social proximity, respect, recognition, cooperation, solidarity, family support, access to resources.
Discrimination , racism, sexism, homophobia, restrictions on eligibility, no access to programs, barriers to access, withholding information, departmental silos, government jurisdictions, secretive/restricted communications, rigid boundaries.	STRUCTURAL	Entitlements , access to programs, transparent pathways to access, affirmative action, community capacity building, inter-departmental links, inter-governmental links, accountability, open channels of communication, options for change, flexibility.

Figure 2

CREATING YOUR OWN LENS

Readers are invited to create their own inclusion lens, using the template provided on page 12, and by answering the following questions about exclusion and inclusion. Readers are invited to answer these questions using a participatory process that involves people who are excluded. Feel free to photocopy and distribute the questions found on pages 7 to 11. Please refer to the Dimensions and Elements of Exclusion and Inclusion in Figure 2 on page 5 when answering these questions. Fill in the template on page 12 with the elements of exclusion and inclusion appropriate to your situation.

Key Questions

This view of social and economic exclusion and inclusion suggests key questions that could be asked about any policy, program, or practice.

Questions about Exclusion

- Who is being excluded? From what?
- How do you see exclusion working?
- Who benefits from exclusion?

Questions about Inclusion

- Who are the people to be included?
- How do you see inclusion working?
- Who benefits from inclusion?

Questions About Social and Economic Exclusion

Questions About Exclusion

1. Who is being excluded? From what?

YOUR ANSWERS

HOW DO YOU KNOW?

2. What are the sources of exclusion in the policy, program, or practice?

YOUR ANSWERS

HOW DO YOU KNOW?

3. What impacts do the current programs or policies have on promoting exclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

4. What is the impact of exclusion on people in the short term?

YOUR ANSWERS

HOW DO YOU KNOW?

5. Are there long-term impacts?

YOUR ANSWERS

HOW DO YOU KNOW?

6. What are the costs of exclusion? Who bears them?

YOUR ANSWERS

HOW DO YOU KNOW?

7. Who benefits from exclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

8. Who has the resources, responsibility, jurisdiction to address the sources of exclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

Questions About Social and Economic Inclusion

Questions About Inclusion

1. Who are the people to be included?

YOUR ANSWERS

HOW DO YOU KNOW?

2. What legislation, policies, programs, or practices would promote inclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

3. What impacts do the current programs or policies have on promoting inclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

4. What are the measures of inclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

5. Who benefits from inclusion?

YOUR ANSWERS

HOW DO YOU KNOW?

6. Who needs to be involved in the solutions?

YOUR ANSWERS

HOW DO YOU KNOW?

7. What processes are needed to make the solutions work?

YOUR ANSWERS

HOW DO YOU KNOW?

8. What are the desired outcomes of inclusion in the short term?

YOUR ANSWERS

HOW DO YOU KNOW?

9. Medium term?

YOUR ANSWERS

HOW DO YOU KNOW?

10. Long term?

YOUR ANSWERS

HOW DO YOU KNOW?

Looking Through the Inclusion Lens

Questions to Ask

1. How will the policy or program increase or decrease discrimination on the basis of gender, race, age, culture, or ethnicity?

YOUR ANSWERS

HOW DO YOU KNOW?

2. How will the policy or program increase or decrease personal income and resources available for people to participate in social and economic activity and promote income equity?

YOUR ANSWERS

HOW DO YOU KNOW?

3. How will the policy or program increase or decrease isolation and access to resources?

YOUR ANSWERS

HOW DO YOU KNOW?

4. How will the policy or program increase or decrease opportunities for participation in decision making?

YOUR ANSWERS

HOW DO YOU KNOW?

5. How will the policy or program add or remove barriers to common spaces, safe environments, and social interaction?

YOUR ANSWERS

HOW DO YOU KNOW?

6. How will the policy or program protect or compromise the rights of people?

YOUR ANSWERS

HOW DO YOU KNOW?

7. How will the policy or program increase or decrease opportunities for personal development and social support?

YOUR ANSWERS

HOW DO YOU KNOW?

8. How will the policy or program increase or reduce access to resources and programs for excluded groups?

YOUR ANSWERS

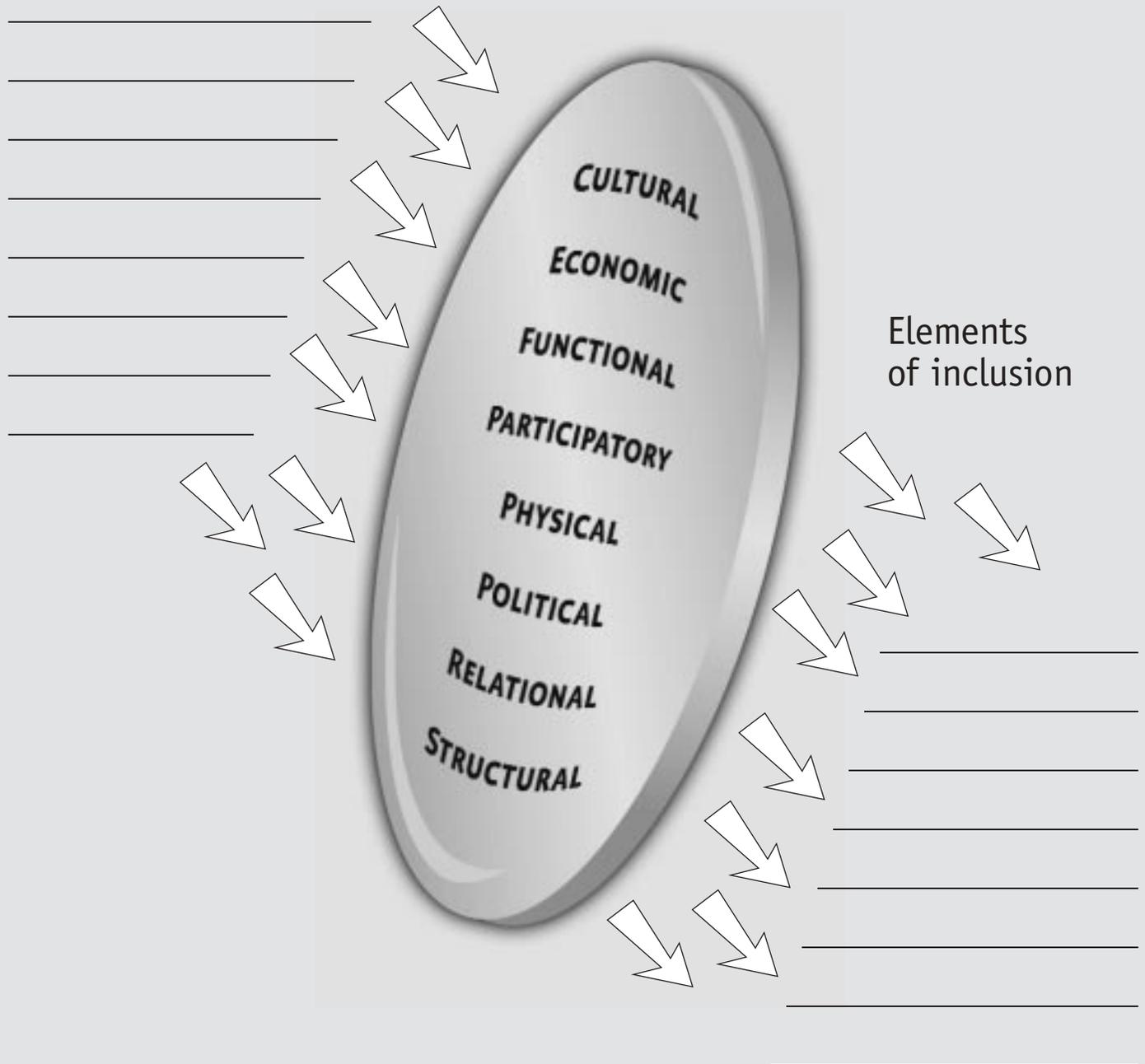
HOW DO YOU KNOW?



INCLUSION LENS TEMPLATE

Readers are encouraged to create their own inclusion lens using this template.

Elements of exclusion



Developing your Action Plan

By now, readers are equipped with an analysis of social and economic exclusion for a selected population, policy, or program, and pointers toward solutions that promote inclusion. The next step is to develop an action plan.

Key Considerations

1. Population.

2. Policy or program.

3. Key strategies.

4. Who is responsible?

5. Roles of partners or collaborators. Who takes the lead?

6. Processes of participation.

7. Resources needed. From where/whom?

8. Timelines.

9. Measures of progress.

10. Desired outcomes.



TAKING ACTION FOR INCLUSION

By using this Inclusion Lens, readers have analyzed the sources of exclusion of a population or community of concern, identified solutions leading toward inclusion, and developed a plan to get started. Congratulations!

Anyone can take action toward a more inclusive society – socially and economically – in Atlantic Canada. People in government, in non-government organizations, community groups, and social agencies can do something to promote social and economic inclusion. We hope that this tool will help you to work toward your goals.



GIVE US FEEDBACK

The Inclusion Lens is a new tool under development by the Population Health Research Unit at Dalhousie University, with financial support and leadership provided by the Population and Public Health Branch, Atlantic Regional Office, Health Canada, and in cooperation with the Maritime Centre for Excellence in Women's Health. We want to hear from people who use the Lens.

Please send your comments to:

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ADDITIONAL INFORMATION

More information about social and economic inclusion can be obtained on the following websites;

www.pph-atlantic.ca
Population and Public Health Branch, Atlantic Regional Office, Health Canada

www.medicine.dal.ca/acewh
Atlantic Centre of Excellence for Women's Health



GLOSSARY OF TERMS

Words listed below appear in *italics* in the document.

Concept	something conceived in the mind.
Development	make active or promote growth.
Dimension	a measure in one direction.
Element	a constituent part.
Jurisdiction	the power, right, or authority to interpret and apply the law.
Legislation	the exercise of the power and function of making rules (as laws) that have the force of authority by an official organ of a state.
Measure	an estimate of what is to be expected (as of a person or situation).
Outcome	something that follows as a result or consequence.
Participatory	providing the opportunity for individual participation.
Plan	method for achieving an end.
Planning	to devise or project the realization or achievement of.
Policy	a high-level overall plan embracing the general goals and acceptable procedures, especially of a governmental body.
Practice	the usual way of doing something.
Program	a plan or system under which action may be taken toward a goal.
Resources	a source of supply or support: an available means.
Sector	a sociological, economic, or political subdivision of society.
Setting	the time, place, and circumstances in which something occurs or develops.
Strategy	a careful plan or method.
System	a regularly interacting or interdependent group of items forming a unified whole.
Systemic	of, relating to, or common to a system.

Appendix 1

Social and Economic Exclusion and Inclusion

Several definitions are offered for social and economic exclusion and inclusion, based on work under way in Atlantic Canada and elsewhere. Readers are encouraged to use whichever definition works best for them.

From *Making the Case for Social and Economic Inclusion*:³

To be included is to be accepted and to be able to participate fully within our families, our communities and our society. Those who are excluded, whether because of poverty, ill-health, gender, race, or lack of education, do not have the opportunity for full participation in the economic and social benefits of society.

From the *Inclusion Project Information Kit*:⁴

Social and economic exclusion happens when people don't have – and can't get – the education, jobs, decent housing, health care, and other things they need to live comfortably, to participate in society, and to feel that they are valued and respected members of their community.

Social and economic inclusion reflects the need to address poverty and exclusion by including the voiceless and powerless in shaping the policies that affect their lives. It welcomes these individuals and groups into the planning, decision-making and policy-development processes in their community. And it empowers them by offering the opportunities, resources and support they need to participate.

From *Development as Freedom*:⁵

Inclusion is characterized by a society's widely shared social experience and active participation, by a broad equality of opportunities and life chances for individuals, and by the achievement of a basic level of well-being for all citizens.

From *What needs to change? Toward a vision of social inclusion for children, families and communities*:⁶

Social inclusion is the capacity and willingness of our society to keep all groups within reach of what we expect as a society – the social commitment and investments necessary to ensure that socially and economically vulnerable people are within reach of our common aspirations, common life and its common wealth.

Exclusion, Inclusion and Health

Social and economic inclusion provides a framework that includes all of the determinants of health. International evidence has established that economic inequality is a powerful determinant of health. The wider the gap between the rich and the poor, the poorer the health status of the entire population.⁷ Adequate income, education and a network of relationships enable people to participate as valued members of society.⁸

The experience of exclusion can be seen through the interplay of the determinants of health:⁹

Each linkage deepens the experience of exclusion, and over the entire life cycle, the depth of exclusion is reinforced... The linking of low access to resources, low social status, low levels of education and healthy child development, high levels of racial intolerance and unemployment, fragmented social networks, and limited access to health services, deepens the exclusion.¹⁰

Exclusion has both social and economic costs. As the number of people excluded from participation in their community grows, their individual problems affect the well-being of society.¹¹

Poverty leads to poor health. Poor health leads to unemployment. Unemployment leads back to more poverty, and to increased crime and violence. All of these create costs that we pay now and that our children will continue to pay.¹²

Appendix 2

The Determinants of Health¹³

A population health approach measures and analyzes the full spectrum of factors — and their interactions — known to influence and contribute to health. Commonly referred to as the determinants of health, these factors include social, economic, and physical environments; early childhood development; personal health practices; individual capacity and coping skills; human biology; and health services.

INCOME, INCOME DISTRIBUTION, AND SOCIAL STATUS.

Research indicates that income and social status are the single most important determinants of health. Studies show that health status improves at each step up the income and social hierarchy. In addition, societies which are reasonably prosperous and have an equitable distribution of wealth have the healthiest populations, regardless of the amount they spend on health care.

SOCIAL SUPPORT NETWORKS. Better health is associated with support from families, friends, and communities. Some studies conclude that the health effect of social relationships may be as important as established risk factors such as smoking, obesity, high blood pressure, and a sedentary lifestyle.

EDUCATION. Health status improves with the level of education and literacy, including self-ratings of positive health or indicators of poor health such as activity limitation or lost work days. Education increases opportunities for income and job security, and provides people with a sense of control over life circumstances – key factors that influence health.

EMPLOYMENT AND WORKING CONDITIONS. People who have more control over their work circumstances and fewer stress-related demands on the job are healthier. Workplace hazards and injuries are significant causes of health problems. Moreover, unemployment is associated with poorer health.

SOCIAL ENVIRONMENTS. Societal values and rules affect the health and well-being of individuals and populations. Social stability, recognition of diversity, safety, good human relationships, and community cohesiveness provide a supportive social environment which mitigates risks to optimal health.

PHYSICAL ENVIRONMENT. Physical factors in the natural environment such as air, water, and soil quality are key influences on health. Factors in the human-built environment such as housing, workplace safety, community and road design are also important factors.

HEALTHY CHILD DEVELOPMENT. The effect of prenatal and early childhood experiences on health in later life, well-being, coping skills, and competence is very powerful. For example, a low birth weight links with health and social problems throughout the lifespan. In addition, mothers at each step up the income scale have children with higher birth weights, on average, than those on the step below.

PERSONAL HEALTH PRACTICES. Personal practices such as smoking, use of alcohol and other drugs, healthy eating, physical activity, and other behaviours, affect health and well-being. Many of Canada's most common health problems are linked to these practices.

INDIVIDUAL CAPACITY AND COPING SKILLS. Social environments that enable and support healthy choices and lifestyles, as well as people's knowledge, intentions, behaviours, and coping skills for dealing with life in healthy ways, are key influences on health.

BIOLOGY AND GENETIC ENDOWMENT. The basic biology and organic make-up of the human body are fundamental determinants of health. Inherited predispositions influence the ways individuals are affected by particular diseases or health challenges.

HEALTH SERVICES. Health services, especially those designed to maintain and promote health, prevent disease and injury, and restore health, contribute to population health.

GENDER. Refers to the many different roles, personality traits, attitudes, behaviours, relative powers, and influences which society assigns to the two sexes. Each gender has specific health issues or may be affected in different ways by the same issue.

CULTURE AND ETHNICITY. Come from both personal history and wider situational, social, political, geographic, and economic factors.

It is acknowledged that culture and gender have a cross-cutting, influential effect on all the other health determinants.

This list of health determinants may evolve as population health research reveals new insights related to the factors and conditions that influence and contribute to health.

Endnotes

¹ Janet Guildford, *Making the Case for Social and Economic Inclusion*, Population and Public Health Branch, Atlantic Regional Office, Health Canada, Halifax, 2000. www.pph-atlantic.ca

² Ibid.

³ Ibid.

⁴ Atlantic Centre for Excellence in Women's Health, *Inclusion Project Information Kit*, Halifax, 2000. www.medicine.dal.ca/acewh

⁵ Amartya Sen, *Development as Freedom*, Anchor Books, 2000.

⁶ Christa Freiler, *What needs to change? Towards a vision of social inclusion for children, families and communities*, draft concept paper, Laidlaw Foundation, Toronto, October 2001. www.laidlawfdn.org/

⁷ Guildford.

⁸ Ibid.

⁹ Health Canada, *Key Learning Two from PPHB Atlantic's Work on Social and Economic Inclusion 1998-2000*, Population and Public Health Branch, Atlantic Regional Office, Health Canada, Halifax, 2000.

¹⁰ Ibid.

¹¹ Atlantic Centre for Excellence in Women's Health.

¹² Ibid.

¹³ Health Canada, *The Population Health Template: Key Elements and Actions That Define a Population Health Approach*, Population and Public Health Branch, Strategic Policy Secretariat, Health Canada, Ottawa, July 2001. www.hc-sc.gc.ca/hppb/phdd/pdf/discussion_paper.pdf

