

## Voices from the Margins: Policy Advocacy and Marginalized Communities

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### ABSTRACT

This article aims to explore policy advocacy processes facilitated by social service nonprofit organizations (NPOs) using a social justice lens. Qualitative interview results from 39 NPOs from 18 communities provide a deeper understanding of advocacy, revealing that NPOs perceive that policy advocacy is not a discrete phenomenon, that advocacy activity differs in visibility and scale, and that advocacy strategies are clearly informed by NPOs' front-line service delivery work. A typology of policy advocacy showing different advocacy types and their fluid nature is presented. The results also show that marginalized people's involvement varies depending on a diversity of influential conditions. Conclusions and implications focus on social inclusion/exclusion, the varied and fluid nature of policy advocacy, challenges for practitioners, and the complex nature of "advocacy chill."

### RÉSUMÉ

Les organismes sans but lucratif (OSBL) de services sociaux ont pour mission de préserver la santé des communautés au moyen de défense de politiques sociales. Toutefois, peu d'études concrètes au Canada portent sur la nature des processus en cause, en particulier lorsqu'il s'agit de politiques mises en œuvre au sein de collectivités marginalisées. Cet article a pour but d'explorer sous l'angle de la justice sociale la nature des processus de défense des politiques tels qu'ils sont pratiqués par les OSBL de services sociaux. Un entretien qualitatif avec 39 OSBL issues de 18 collectivités permet une meilleure compréhension des processus. Les OSBL ne conçoivent pas la défense des politiques comme un phénomène discret; les activités qui y sont reliées varient en visibilité et en étendue, et les stratégies employées sont clairement influencées par les services de première ligne qu'offrent les OSBL. Nous proposons une typologie des processus de défense des politiques exposant les différents types d'approches et leur nature changeante. Les résultats indiquent que l'engagement des personnes marginalisées varie en fonction d'un certain nombre de facteurs. Les conclusions et les implications de l'étude se concentrent sur l'exclusion/l'inclusion sociale, la nature variée et changeante du processus de défense de politiques, les défis auxquels font face les praticiens et la nature complexe de la réticence envers l'élaboration de politiques communément appelée « advocacy chill ».

### Keywords / Mots clés

Nonprofit social services; marginalized communities; Social justice; policy advocacy; Civic participation / Services sociaux sans but lucratif; Communautés marginalisées; Justice sociale; Recommandation de politique; Participation civique

## INTRODUCTION

Social service nonprofit organizations (NPOs) work in collaboration with marginalized communities to achieve healthier communities through social service delivery and policy advocacy. It is generally agreed that NPOs have a long history of advocacy and of being “instrumental in the development of most of the public services we rely on today” in Canada (e.g., schools, hospitals) (Voluntary Sector Initiative, 2001, p. 2). The social service NPO sector acts as a “social seismograph,” leading the way in identifying new social issues (Hall & Banting, 2000, p. 3). The NPO policy advocacy role with and for marginalized communities continues to be an important function (Bridge & Gilbert, 2005; Broadbent, 1999).

NPOs work closely and develop relationships with at least two main constituencies when doing policy advocacy: governments and marginalized communities. Understanding the complexity of these relationships, which NPOs must negotiate while undertaking policy advocacy, is essential. Much has been written about NPO-government relations and the coalitions that advocate for policy changes (e.g., Ontario Anti-Poverty Coalition), but in Canada there appears to be no systematic study or primary data on policy advocacy from the perspective of individual NPOs working with marginalized communities. This article is intended to provide an analysis and insights for practitioners, policymakers, and scholars interested in understanding the complex internal nature of policy advocacy processes facilitated by social service NPOs.

In Canada and the USA, NPO advocacy research tends to focus on the NPO-government interface (e.g., political environment, government regulations) as well as NPO organizational characteristics, with little attention to the relationship between advocacy processes and marginalized people. Harvie (2002) reinforces this view: “Surprisingly little empirical data are available on how the voluntary sector participates in public processes or how its advocacy activities vary” (p. 5). There is Canadian literature that describes histories, milestones, stakeholders, and shifting ideologies in advocacy work undertaken by NPOs, activists, academics, and marginalized people themselves (see, for example, Stienstra & Wight-Felske, 2003). Research in Canada has also been conducted on the effects of government regulatory regimes (Pross & Webb, 2003); on legal issues of charitable lobbying activities (Bridge, 2002; Phillips, Chapman, & Stevens, 2001); and on the number of volunteers who do advocacy work (Hall, Lasby, Gumulka, & Tryon, 2006).

Research in the USA has been conducted on nonprofit organizational resources (e.g., finances, staff skills, technology); environmental incentives (e.g., government funding relationships); tactical choices; and extent and frequency of advocacy (Mosley, 2009, 2010; Nicholson-Crotty, 2009; Salamon & Lessans Geller, 2008). In a recent study, a majority of NPOs indicated they rarely or never involve their clients in advocacy work (Salamon & Lessans Geller, 2008). Further, in other research, there remains an unanswered question: are NPOs “advocating primarily in support of clients’ concerns?” (Mosley, 2009, p. 19). There appears to be a lack of research derived directly from primary data that systematically examines social service NPOs’ perceptions of their own advocacy processes with marginalized groups (i.e., their clients). This paper attempts to address this issue.

It is significant that policy advocacy is a form of civic participation (Salamon & Lessans Geller, 2008), and participation is a key dimension of social justice theory (Mullaly, 1997). Taken together, civic participation and social justice make a compelling case for the inclusion of marginalized groups in advocacy work. Social justice theory espouses that people who are directly affected by a new or modified social policy should participate in deliberations about that policy (Mullaly, 1997). Elson (2004) wonders about NPO

philosophy regarding disadvantaged groups, specifically regarding the degree to which social justice and social inclusion are encouraged. Participation is a defining criterion of democratic nations like Canada, but currently there seems to be a “democratic deficit” (Canadian Policy Research Networks & Ascentum Inc., 2005, p. 6; see also Abelson et al., 2003), making research on the participatory nature of policy advocacy especially timely.

Despite this deficit, there is growing interest in the involvement of NPOs in democratic governance and policy formulation (Brock, 2001; Orsini & Smith, 2007). Policy advocacy remains one of the most “controversial areas of government and voluntary sector relations” (Brock & Banting, 2001a, p. 10). Different NPOs have different types of relationships, different degrees of power-sharing and dependency, and different degrees of relational formality with governments (Boudreau, 2006; Brock, 2002; Brock & Banting, 2001b; Coston, 1998). In Canada, despite the five-year, \$94-million, federal government–NPO sector Voluntary Sector Initiative (VSI), which recognized that advocacy and policy participation were essential to healthy debate and social change in a democratic society, issues persist (Brock, 2001; S. Phillips, 2001, 2009). Some issues stem from governments and their rules (Bridge & Gilbert, 2005; Elson, 2004) while others stem from the non-formal institutional structure of the NPO sector itself (Elson, 2008). It is curious that no Canadian government, unlike the U.K., “has had an actual agenda for its relationship with the voluntary sector that is built on a coherent philosophy about the role of the voluntary sector in democracy, citizenship and governance” (S. Phillips, 2009, p. 9).

This article explores the nature of policy advocacy processes facilitated by social service NPOs in Saskatchewan, Canada, using a social justice lens. The research focuses on three research questions: a) How do NPOs perceive and describe their policy advocacy work? b) Do social service NPOs engage marginalized people in their policy advocacy processes and, if so, how? and c) What conditions influence the involvement of marginalized people and the type of advocacy pursued? The research here demonstrates that a heterogeneous group of 39 NPOs in Saskatchewan are actively engaged in changing social policies in a multiplicity of ways, but with varied marginalized community involvement. In general, the advocacy climate in Saskatchewan has shifted over time: the 1970s was a time when governments expected NPO advocacy, while the early 2000s was a time when governments regularly reminded NPOs that they should not be doing advocacy (DeSantis, 2008).

## LITERATURE

### Policy Advocacy and Civic Participation

Social policy advocacy is a form of civic participation (Boris & Mosher-Williams, 1998; Phillips & Orsini, 2002; Salamon & Lessans Geller, 2008) where individuals “are actively engaged in social and political action such as lobbying” directed at governments (Hancock, Labonte, & Edwards, 2000, p. 53). Rektor (2002, p. 1) defined the process of advocacy as “the act of speaking or of disseminating information intended to influence individual behaviour or opinion, corporate conduct, or public policy and law.” Advocacy means speaking up “in a situation that is viewed as undesirable, unfair and changeable” (Wight-Felske, 2003, p. 324; see also Brooks, 2001; Neufeldt, 2003). Ezell’s (2001) advocacy definition was modified (see additions in italics) to focus specifically on policy, NPOs, and marginalized communities and adopted for this research: *social policy* advocacy consists of those intentional efforts of NPOs to change existing or proposed *government* policies on behalf of or with groups of *marginalized people*.

Advocacy strategies include interactions with policymakers and politicians (e.g., amicable meetings, angry confrontations); media strategies to generate public awareness; and legal approaches through the courts (Cohen, de la Vega, & Watson, 2001; D'Aubin, 2003; Dobson, 2003; Hick & McNutt, 2002; McCarthy & Castelli, 2001). The general goal of policy advocacy is to improve people's lives through changes to government systems and policies, programs, legal definitions, and ideologies that impact communities (Cohen et al., 2001; Ezell, 2001; Jansson, 1999; McCarthy & Castelli, 2001; Sheldrick, 2004). Although advocacy can take on many forms based on the socio-political nature of the jurisdiction where it is applied, this research reflects advocacy practice in Canada (Enns, 2003).

Despite the awareness on the part of NPOs across the country of the need for policy advocacy, there is clear evidence of "advocacy chill" in Canada. "Advocacy chill" refers to the inhibitory effect that government laws and funding regimes have had on NPO advocacy behaviour over the past few decades—a phenomenon that is, in essence, a form of "civic participation chill." Recently, the federal Lobbyist Act proposes to place more requirements on organizations to register and list their interactions with politicians and senior officials (S. Phillips, 2009). Another law that is better known to registered charitable NPOs, the Income Tax Act, administered through the Canada Revenue Agency (CRA), specifies what kinds of advocacy activities are permitted and the penalties for non-compliance (Bridge, 2002; Elson, 2008; Harvie, 2002; J. Phillips, 2001). In general, "charitable activities" are fully permitted but "political activities" (i.e., advocacy) are only partially permitted (Bridge & Gilbert, 2005, p. 154); political activities that do not use more than 10% of large charitable NPO resources and 20% of small charitable NPO resources are permitted. There seem to be inequities in the way different charities are scrutinized. CRA appears to treat research institutes more leniently than grassroots organizations (Broder, 2002), as do the courts (J. Phillips, 2001). Despite the many years of NPO-CRA discussions and the policy changes indicated above, there is still a lack of clarity for NPOs that are registered charities regarding what does and does not constitute political activity. This lack of clarity leads to confusion in interpretation of laws for some NPOs, in turn stifling advocacy action for fear of government reprisals (DeSantis, 2008). Hence, a culture of "advocacy chill" is created.

Further, shifts in government funding regimes across Canada also appear to create a chill on NPO advocacy. Since the 1970s, a number of trends in this area have greatly affected NPOs, namely a reduction in the number of core/operating grants, an increase in the number of contracts or fee-for-service arrangements, an increase in project funding, funding cuts to some NPO programs, and the downloading of government services to NPOs (Banting, 2000; Brock & Banting, 2001b; Brooks, 2001; Hall et al., 2005; Rice & Prince, 2003; Scott, 2003; Vaillancourt & Tremblay, 2002). In particular, NPOs with government contracts report pressure to deliver services and de-emphasize advocacy and community outreach (Scott, 2003). Since the early 1990s, successive federal governments have cut millions of dollars from NPOs, many of which were known for their advocacy work (S. Phillips, 2009). Further, these funding trends have created a competitive environment where NPOs who compete against each other for funding do not readily cooperate on advocacy campaigns (Browne, 1996; DeSantis, 2008; Luther & Prempeh, 2003).

## Policy Advocacy Processes and Social Justice

It is worth pausing to ponder the necessity of social service NPO engagement in policy advocacy work. In their simplest form, social policies are about choices made by governments (Graham, Swift, & Delaney, 2003; Wharf & McKenzie, 1998). Social policies are broadly stated and “are guiding principles ... motivated by basic and perceived human needs.... Social policies tend to, but need not be, codified in formal legal instruments” (Gil, 1992, p. 24), such as government acts, regulations, or bylaws. The policy choices made by governments are influenced by different models of policymaking (Graham et al., 2003; Orsini & Smith, 2007). These different models illustrate that policymaking is usually driven by experts and politicians (Graham et al., 2003; Wharf & McKenzie, 1998). Often the community and NPOs are left working outside government, hence the need for a policy advocacy function. Graham et al. (2003) conclude, “There are very few built-in structures in Canada to ensure that citizens, both those directly affected by policy or those with an interest in policy, have the opportunity to be heard” (p. 185). This lack of involvement is a form of social exclusion and runs counter to social justice theory.

Social justice theory posits that those people who are the focus of a new or modified social policy should participate in policy deliberations (Mullaly, 1997). Social justice is central to policy advocacy processes advanced by some NPOs with marginalized communities (Boucher, Fougeryrollas, & Gaucher, 2003; Institute for Media Policy and Civil Society, 2002). Given their front-line social service delivery role, these NPOs are intimately aware of the effects of marginalization. Marginalization refers to groups of people who may be excluded economically, politically, socially, and/or psychologically from their communities (Jenson, 2000). Advocacy seeks to assist “relatively powerless groups, such as women, children, poor people ... and people with disabilities” (Jansson, 1999, p. 10) to be included in policy deliberations that directly affect them.

NPOs engage these groups in varying degrees during advocacy processes. Advocacy processes have multiple dimensions, comprise different phases, and often involve different constituencies (Boris & Mosher-Williams, 1998; Mosley, 2009, 2010; Salamon & Lessans Geller, 2008). NPOs may involve marginalized groups in various ways: in the entire advocacy process, only at the beginning as evidence is gathered on potential policy impacts, periodically in public presentations, in key meetings with government representatives, or not involve them at all. In a nationwide USA survey, Salamon & Lessans Geller (2008) found that the degree of marginalized people’s exclusion appears to be very high, with 88% of NPOs stating they “never or rarely involve” their clients in advocacy (Salamon & Lessans Geller, 2008, p. 12). Reasons for this finding were not described. What is striking is the lack of research on what NPOs are advocating for and who benefits (Mosley, 2010).

In summary, NPO advocacy is an important vehicle for civic participation, required because many governments’ social policy-making processes do not include participation by those who are affected by a new or modified policy. Social justice theory supports participation and inclusion of marginalized groups in advocacy work, but government rules and funding regimes have had a chilling effect on NPO advocacy. Given the various forces at play in the reality of NPOs, the nature of advocacy with/for marginalized groups by these NPOs is complex and worthy of further investigation.

## METHOD



## Saskatchewan NPOs

Saskatchewan has an active NPO community. The province ranked second in Canada for the number of NPOs per capita (i.e., 800 organizations per 100,000 people in Saskatchewan, in contrast to 508 organizations per 100,000 people nationally) (Hall et al., 2004). The NPOs in Saskatchewan are also quite diverse. Hall et al. (2004) estimate there were 7,963 registered organizations in this province with a population of just over one million people. Using the International Classification of Nonprofit Organizations (ICNPO), 8.6% or 685 organizations in Saskatchewan were classified as “social services.” Other NPOs fell into the following categories: 2,080 religion, 1,920 sports and recreation, 810 arts and culture, 640 fundraising and voluntarism promotion, 420 business/professional/unions, 335 health organizations (including mental health), and 335 education/research organizations, with the remaining 738 organizations in the categories of development and housing, environment, universities/colleges, hospitals, international development, and law/advocacy/politics.

## Sample Description

Social service NPOs are the focus of this research. Social service NPOs refer here to a range of organizations that provide services to specific populations (e.g., people with mental health disabilities, people living on low incomes, single-parent families) to promote their social, mental, and economic well-being as well as protect and advance their civil and human rights. For the purpose of this study, social service NPOs incorporate these ICNPO categories: social services, development and housing, advocacy for human rights, and health (mental).

A heterogeneous population sample of social service NPOs in Saskatchewan that engage in advocacy activities was generated. This was accomplished by using two government datasets: the registered charities dataset maintained by the Canada Revenue Agency and the registered nonprofit corporations dataset maintained by Saskatchewan Justice, Corporations Branch. These two datasets were merged into one master dataset, and 1,420 identified, registered social service-type NPOs were sorted into an alphabetical list by city/town/First Nation reserve.<sup>1</sup> This list was further divided using location (i.e., northern and southern areas of the province) and size of community (i.e., small, medium, and large) as key variables. From this file, a purposive sample of 95 NPOs was created using two additional variables: size of NPOs (i.e., small, medium, and large) and NPOs that serve a variety of marginalized populations.<sup>2</sup> The final criterion for participation was that the NPO had to have at least five years of community-based policy advocacy experience involving marginalized groups of people.

Of these 95 NPOs, 39 NPOs from 18 communities agreed to participate. This sample of 39 NPOs acknowledged that they do policy advocacy; thus, they are policy advocates who are active in changing the status quo with/for marginalized groups. The remaining group of 56 NPOs comprised a variety of organizations that refused to participate in the study for a variety of reasons: they did not want to talk about their advocacy work; they said they do not do advocacy; they did not have time to participate; or they simply did not respond to multiple requests to participate. Consequently, this sample is biased in favour of NPOs who acknowledge they do policy advocacy and are willing to talk about it. Although the sample is diverse, there are types of NPOs that are missing (e.g., child care, literacy, international development), and one should be cautious about drawing generalizations beyond this sample. Table 1 offers a profile of the 39 NPOs interviewed for this study.

**Table 1 Profile of the 39 NPOs interviewed**

Characteristic	# of NPOs
<b>Location in Saskatchewan</b>	
Northern area—Prince Albert and northward	10
South of Prince Albert	29
<b>Size of community*</b>	
Small (less than 6,999 people)	9
Medium (more than 7,000 people but less than 40,000)	12
Large (more than 180,000)	18
<b>Size of agency**</b>	
Very small = < \$30,000 annual revenue, typically no staff, all volunteers	4
Small = \$30,000 to \$99,999 annual revenue, typically 1–4 FTE staff	6
Medium = \$100,000 to \$499,999 annual revenue, typically 5–9 FTE staff	13
Large = \$500,000 + annual revenue, typically 10 or more FTE staff	16
<b>Primary area of activity (from ICNPO)†</b>	
Social services (e.g., food banks, agencies serving those with disabilities)	22
Mental health services (e.g., community mental health agencies)	6
Development & housing (e.g., neighbourhood groups, nonprofit housing)	6
Rights-based advocacy services (e.g., anti-poverty organizations)	5
<b>Person interviewed (respondents)</b>	
Executive director/managers	23
Front-line staff	7
Board presidents	4
Small-group interviews (four groups had 2 people each, one group had 4 people)‡	5
<b>Sex of respondents (total of 47, not 39, because small groups interviewed)</b>	
Female	21
Male	26

**Notes:** \* At the time of data collection, there were no communities in Saskatchewan with populations between 40,000 and 180,000.

\*\* These categories are based on Hall et al. (2004).

† ICNPO, the International Classification of Nonprofit Organizations, focuses on the primary area of agency activity; some major research initiatives in Canada have adopted this classification system instead of the Canada Revenue Agency system (see, for example, Hall et al., 2004).

‡ The five NPOs that requested more than one person be involved in the interview said they would better represent their NPO with more than one voice involved. Since the NPO was the unit of analysis, their request was granted.

The marginalized groups of people served by these 39 NPOs included the following: adults/teens with cognitive, psychiatric, and/or physical disabilities; individuals, families, and seniors living in poverty; single-parent families; First Nations and Metis peoples; women and men released from corrections facilities; female victims of domestic violence; people who are homeless/transient; immigrants and refugees; and people living in high-risk neighbourhoods (e.g., high crime rate). It was common for NPOs to serve more than one of these groups simultaneously.

## Data Collection and Analysis

A semi-structured telephone interview guided data collection. The interview questions were as follows:

- a. Please describe public policy advocacy undertaken by your organization in collaboration with marginalized groups of people, and, if relevant, in partnership with other voluntary agencies. Be prepared to discuss one or two examples/case studies which best illustrate the key characteristics of your agency's policy advocacy work.
- b. What are the specific advocacy strategies and activities in which your agency actually involved marginalized groups of people in the policy advocacy work you cited?
- c. Why did/does your agency use these strategies and activities?
- d. What barriers surfaced to prevent marginalized people's participation and what opportunities did you pursue in an effort to enhance their participation in those example(s) you cited?

The interviews were audio-recorded and then transcribed verbatim. Inductive analysis from the data was completed (Lincoln & Guba, 1985). Data analysis of the 800 pages of interview transcripts included coding, categorizing, and theme development (Strauss & Corbin, 1998).

## RESULTS

### **NPOs' Descriptions of Policy Advocacy and Marginalized People's Involvement**

Through inductive analysis, it became evident that NPO description of policy advocacy varied considerably. NPOs described how their policy advocacy work was informed by their front-line service delivery work with their clients (i.e., marginalized individuals), discussed how policy advocacy may not have discrete boundaries, and stated that policy advocacy varies in scale and visibility.

In general, advocacy work by the 39 NPOs was informed by their daily, front-line, one-on-one work with clients; for example, as one respondent said, "We don't officially have a policy advocate.... Things just come out of our service delivery and I think that we kind of use that to rationalize our lobbying efforts." NPOs said they knew what policy changes were required because of their day-to-day front-line work with people in need. For some NPOs there also seemed to be the need to defer to clients' opinions about how far to go with advocacy. The following quote illustrates this viewpoint.

We were going to lobby for something bigger ... but I wasn't going to make any waves as long as she [a client] was still kind of beholden to those folks [at Social Services] because again our concern is what's best for her and if she didn't want to pursue anything there was absolutely no question that we weren't going to get involved.... If the client's moved on and you've got your hands full ... we do constantly worry about what's good for the client and whether, you know, what's good for the rest of the world, a political issue is, you know, worth fighting about. Yeah, sometimes we do defer to the client's needs and wishes at that point and let the big stuff slide.

Although NPOs were explicitly asked about their policy advocacy, many insisted on talking about their one-on-one advocacy with clients, program advocacy, funding advocacy for these programs, and research-oriented advocacy. Twenty-nine of the 39 NPOs explained the interconnections between these different types of advocacy; thus in practice these types of advocacy were not discrete activities. For



example, depending on the situation, respondents explained they might have been advocating for a change in government policy, but then had to switch to advocating for a research initiative to find answers to some questions that informed the proposed policy change. One respondent explained this well:

When we talk about public policy advocacy ... and I was looking at your definition here ... in our pamphlet about our agency, we basically identify that we provide advocacy ... and we have defined that as part of our mandate .... to improve services for persons with mental illness ... through increased funding and changes to legislation and policies ... and that is a very broadly defined concept. We do that only in partnership with our funders and other community-based organizations and other government organizations. We get involved with other people to try and advocate for improved services and increased funding. Then we, on a day-to-day basis, are involved in advocacy for our residents in our programs that are a little more specific to what their needs might be.

Some NPO policy initiatives included the involvement of marginalized people while others did not. Of the 42 policy initiatives described by NPOs, 14 (33%) of these initiatives excluded marginalized people while the remaining 28 (67%) involved them. The following are some examples of policy initiatives that involved marginalized groups:

- low-cost transit policy
- municipal property base tax policy
- women's retraining policy
- city anti-violence bylaw
- policies against the medical model of mental illness
- child welfare geographical boundaries
- city bylaws regarding nonprofit housing
- extrajudicial sanctions for youth
- First Nations spirituality in correctional institutions
- advanced language training for immigrant professionals
- respite policy for caregivers of people with disabilities
- provincial social assistance policies
- domestic violence act
- supportive housing for adults with cognitive disabilities

Another significant finding was that advocacy activities appeared to take place on a continuum based on visibility and scale. At one end of the continuum one could put NPOs that did advocacy but hid it, for example: their advocacy was simply about them "voicing their opinion" with government officials and working behind the scenes; or they were funded solely to do one-on-one advocacy and "hope[d] government workers saw the bigger problem." Further along the continuum was another group of NPOs that were more visible, in that the NPO "cracked open that door a bit" by explicitly explaining to governments about the need to change policies; their work was still small-scale in that they did not join coalitions, or they kept a low profile by staying away from the media.

On the opposite end of the continuum is yet another group of NPOs whose advocacy work was large-scale, formal, and visible. This included large NPOs and NPOs that operated on a province-wide basis as well as NPOs that received either federal or provincial government funding to do policy advocacy targeted at another level of government. It also included NPOs that joined province-wide networks that did not receive government funding but were quite visibly active, through the media for example, in working to change government policies. A description of the types of NPO advocacy and the involvement of marginalized groups is required before explaining the myriad conditions that influence these NPO processes.

### **Advocacy Typology and Marginalized People's Involvement**

A majority of the policy initiatives (67%) involved marginalized people in advocacy processes. Across the sample, a diversity of types of advocacy, forms of participation, and dynamic processes was revealed. A data typology based on this analysis was developed. Embedded in the Figure 1 typology are the following: impetus for embarking on advocacy; participation decision points; policy advocacy "types"; and arrows that denote the fluid nature of advocacy processes.

The left box in Figure 1 shows that NPO service delivery work was the impetus for their advocacy work. According to one NPO, "That's the opportunity that will always be there as long as we're involved in direct service delivery ... we'll always have our finger on the pulse." It is from their service delivery work that these NPOs saw problems experienced by their clients, which they believe required action. Some NPOs noted their advocacy work began with a crisis (e.g., a murder in a neighbourhood, a drug house raid by police that brought immediate attention to a community) while others indicated it was the cumulative, repetitive day-to-day issues that led to policy advocacy.

NPOs acknowledged their social service delivery work led them to decision-making points about their advocacy work. If NPOs saw the same issue occurring with a group of people and not just with an individual, then further action was discussed and decisions were made among the NPO staff, volunteers, and sometimes among other NPOs, as well as in consultation with clients. These circumstances led to one of three possible decisions as shown in the three middle boxes in Figure 1: no collective policy action ensued; advocacy moved forward *without* marginalized people's participation; or advocacy moved forward *with* marginalized people's participation. Since marginalized people's participation in advocacy processes was a central feature in this study, they became one of the defining features in Figure 1.

The series of boxes on the right side of Figure 1 shows the multiple types of advocacy that were pursued. First, some policy advocacy initiatives were pursued *without* marginalized individuals and included the following three types: a) a single NPO picked up an initiative and advocated for change; b) groups of NPOs got together and formed a coalition or network without government participation and were either locally based or province-wide; and c) a coalition of NPOs worked together with government representatives on initiatives that were either time-limited or ongoing. Second, some policy advocacy was pursued *with* marginalized people directly involved and included the same three advocacy types with one additional element—the addition of self-help NPOs, which in this case refers to NPOs operated by/for marginalized individuals.

The arrows shown on the right side of Figure 1 represent the fluidity of advocacy work. These arrows illustrate that NPOs chose and altered types of advocacy and involvement of different constituencies over time; some NPOs noted, however, that they chose and implemented one type of advocacy for the

duration of an advocacy initiative. These social policy advocacy initiatives had life cycles, but it appears these cycles were seldom identical.

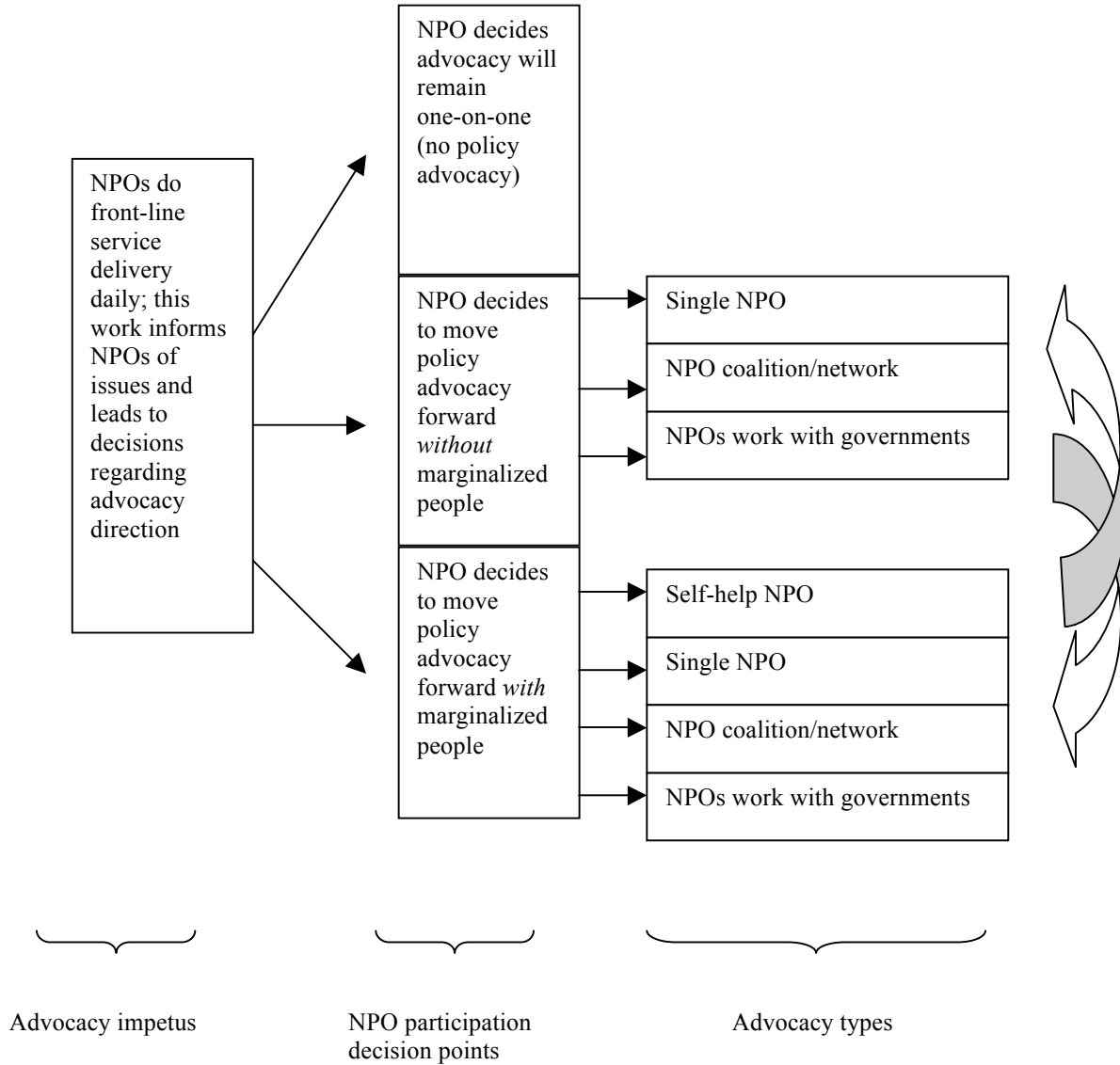
Given the dynamic and fluid nature of NPO policy advocacy illuminated in Figure 1, it is not surprising that marginalized people's participation was varied. NPOs described multiple forms of involvement throughout advocacy processes, including the following:

- a. interacted with the general public and the media to create awareness of issues (e.g., public demonstrations like parades, radio talk shows);
- b. interacted with governments (e.g., created opportunities for interactions among marginalized groups and governments within community settings, initiated conversations/meetings with governments and ensured marginalized people attended the meeting, encouraged marginalized groups to participate in formal government meetings, created confrontations with governments);
- c. worked behind the scenes on activities intended to create an evidence base in support of a policy and networked across groups (e.g., engaged in participatory action research, talked with marginalized groups, cross-fertilized issues across different groups).

Table 2 contains descriptions of these data along with examples of marginalized people's participation; this list is not exhaustive, but rather it is intended to give the reader a sense of the scope of activities. Omitted from this table was a key activity for which none of the NPOs described any involvement of marginalized groups: courts and legal actions, including taking issues to the provincial Ombudsman's Office. Finally, 13 of the NPOs disclosed they had staff that had, or they themselves had had, experiences with marginalization, thus these experiences were brought to policy discussions even if their clients were not at the table.

Myriad conditions influenced the type(s) of NPO advocacy, the involvement of marginalized people, and other choices during advocacy processes, which reinforced the dynamic nature of advocacy work shown in Figure 1. These multiple conditions are presented next.

**Figure 1: Typology of social policy advocacy involving marginalized individuals**



**Table 2: Marginalized people's forms of participation throughout advocacy processes**

Advocacy activities	Examples of marginalized people's participation
<b>a) Interacted with general public and media to generate awareness</b>	
<p>Included speaking out on a small scale (e.g., at high schools) or large scale through the media (e.g., newspapers and radio talk shows for anti-stigma campaigns) as well as public demonstrations (e.g., parades)</p>	<p>"We developed three videos and they were stories about supported employment ... So people with developmental disabilities talk about what they did..."</p>
<b>b) Interacted with governments</b>	
<p><b>Created open educational opportunities for interactions among marginalized groups and governments in community settings</b></p> <p>Included holding large public gatherings like conferences/workshops, NPO annual general meetings, and social events that were meant to be entertaining but carried a message (e.g., multicultural festivals). This included creating space and time for government staff/politicians to "visit" with marginalized groups of people. For example, this was commonly used to give cognitively impaired adults the chance to talk to government representatives as they walked through their workshops or group homes.</p> <p><b>Initiated conversations with governments</b></p> <p>This occurred informally in grocery stores or on the streets in small communities, as well as through meetings organized by NPOs, NPO/government partnerships, and conversations with opposition parties.</p> <p><b>Brought marginalized people to participate in formal government meetings organized by governments</b></p> <p>This included taking marginalized groups of people to city council, to the legislature (e.g., Cabinet Days), and to cross-government department meetings to tell their stories.</p> <p><b>Created confrontations with governments</b></p> <p>Some NPOs chose to advocate for the enforcement of already-existing policies like city bylaws and provincial regulations. Also included here were sit-ins at elected representatives' offices.</p>	<p>"Have the meeting with government here, once people come and see who it is that we're asking for things for, it personalizes it... We actually took the first [government] fellow around and had him meet the people here.... You get inundated at our place.... We have four or five participants that will just immediately be there wanting to have a conversation with you."</p> <p>"He [the mental health consumer] was the one ... a meeting would be called and he'd be the one to phone everyone to ... remind them about the meeting with the government.... And he'd talk quite openly at the meeting."</p> <p>"The co-chair of our committee is not associated with any agency. She's a parent and has had family involvement with sexual assault and victimization ... so she and I are both doing that presentation."</p> <p>"What we did was we ... and that includes low-income residents, learned about government policies and procedures ... regulations under different legislative bodies from health, fire, and city ... and demanded city council [follow them]..."</p>
<b>c) Created evidence and networked behind the scenes</b>	
<p><b>Conducted or participated in research and wrote papers</b></p> <p>Included research conducted by NPOs such as action research, researched and wrote anthologies, and conducted feasibility studies. It also included seeking out best practice models locally,</p>	<p>"They [low-income people] helped with the development of the survey for the feasibility study."</p>



<p>provincially. and nationally. NPOs noted community research encourages people to talk and problem-solve together.</p> <p><b>Talked with marginalized groups and then moved forward</b></p> <p>Includes small groups of people getting together to learn, reflect, and act (e.g., anti-poverty parleys, study circles, consumer/tenant groups). It also includes chiefs and band councils because even though Aboriginal communities have their own governments, they can be marginalized within the larger system of human services.</p> <p><b>Networked with other groups and cross-fertilized issues</b></p> <p>Cross-fertilization of issues occurred when people took policy issues from one meeting to other meetings and explained how they were linked. For example, this occurred when an NPO took a shelter subsidy problem that was already being pursued in one group to another group that was working on a training allowance problem—both of which were a provincial government issue. Also included here was collecting signatures on petitions.</p>	<p>“We started the anti-poverty parleys. We brought low-income people.... They talked about their issues ... a list of issues.... Then we brought every one back together and asked them how we should address these things.”</p> <p>“We all kind of sit on each other’s boards ... and there are [mental health] consumers there. Of course, I’m on other boards as well and if there’s a big issue ... it’s talked about, like at all these different tables, the critical mass.”</p>
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**Conditions influencing marginalized people’s involvement and types of advocacy**

NPOs described many conditions that affected their decisions about their advocacy work generally and the involvement of marginalized people specifically. These conditions add depth to Figure 1 and further describe the dynamic and fluid nature of advocacy work. Respondents were not explicitly asked about conditions that affected their advocacy decision-making, but these conditions were revealed through scanning all the codes and categories as well as through re-reading corresponding segments of transcripts in search of patterns (Alvesson & Sköldberg, 2000; Yin, 2003). These conditions included NPO perceptions of marginalized people, their own organizations, other proximal NPOs, governments, and communities. After a thorough analysis, it appears these conditions do not consistently affect advocacy processes in the same way or direction. For example, in one community a women’s shelter encouraged women’s participation in advocacy processes while in another similar-sized community, a women’s shelter did not engage women at all.

The first set of conditions had to do with *NPOs’ perceptions of marginalized people*. NPOs’ perceptions of the barriers faced by marginalized people influenced their choices about advocacy processes, especially regarding who was given voice and who was not. Using open and axial coding (Strauss & Corbin, 1998), seven main barriers emerged:

- a. psychological barriers (e.g., marginalized people were fearful because of threats from governments, they may have also felt hopeless, inadequate, isolated, and/or stigmatized);
- b. lack of practical supports (e.g., no transportation, no money, lack of proper clothing to go to meetings, no access to technology such as computers to access email messages);

- c. daily survival issues and lack of time (e.g., daily struggle to find food and shelter, too many crises and repeated personal and community trauma such as suicides, no capacity to make a long-term commitment to a process);
- d. disabilities (e.g., episodic psychiatric illnesses);
- e. language and culture (e.g., lack of sign language interpreters at meetings, an Aboriginal person's issue was misinterpreted during a public discussion);
- f. lack of awareness and skills (e.g., lack of awareness of policy processes, lack of understanding of advocacy strategies);
- g. structural barriers (e.g., NPOs and governments did not invite marginalized people to meetings because of their perceptions of the barriers cited above, NPOs thought meetings might be too formal and thus too intimidating for many people, meetings held in physically inaccessible buildings).

All of the NPOs offered explanations about opportunities they pursued to help mitigate the effects of these participation barriers. These included encouraging people to speak out, offering practical supports like rides to meetings, teaching about advocacy processes, and connecting with others who share similar issues.

The second collection of conditions had to do with *NPOs' perceptions of their own organizations as well as the NPOs around them*. Within NPOs, advocacy was influenced by the following conditions:

- available financial resources
- the skill sets of the staff and volunteers
- the credibility of their organization
- time available to pursue advocacy
- the perceived sense of power to make change
- the priority given to service delivery
- the philosophy regarding client engagement and participation (e.g., "We are very careful about where we're going to parade her [a victim of intimate partner violence] out").

With regard to other NPOs, respondents indicated that the advocacy activity was influenced by the following four conditions:

- the number and types of NPOs in a given area
- the distance separating NPOs
- access to communication technology (e.g., email)
- the degree of competition for funding among NPOs

The third set of conditions focused on *governments*. In Saskatchewan there are four levels of government with which some NPOs must interact, depending on the nature of their policy issue—Aboriginal governments (e.g., First Nation band and tribal councils, Metis locals); municipal governments; the provincial government; and the federal government. Within each of these levels of government are different organizational cultures, rules, functions, behaviours, and levels of financial resources. Thus, different relationships, types of participation, and types of advocacy ensued between these NPOs and governments, which in turn affected the participation of marginalized populations. NPO perceptions of governments fell into six main categories:

- a. government level of receptivity to NPOs and their advocacy work (e.g., “Governments are now coming to us,” “The government did not like our inter-agency group and tried to dismantle it”);
- b. government rules, functions, silos, and attitudes (e.g., “We have to follow the 10% rule for charities ... we always live in fear”); nine of the 39 NPOs explicitly noted that CRA rules limited NPO advocacy work while some others stated the rules were so confusing that it was best to be safe and not engage in overt advocacy;
- c. governments-NPOs as partners had a positive spin for some NPOs (e.g., “It’s more of a two-way street now”), but government advisory committees were labelled negatively by other NPOs (e.g., “Typical advisory committee thing that you couldn’t really speak out”);
- d. government funding issues, including special project funding (e.g., “More project funding tied to specific projects means less money and time to do advocacy”), and that some NPOs signed funding contracts with governments in which they agreed not to do advocacy;
- e. political atmosphere (e.g., “When the government is not responsive we see community action” and “You’ve got to be vigilant and speak out no matter what government it is”);
- f. government preference for NPO voices was a substitute for marginalized people’s voices.

The final condition requires comment. In a few instances, NPOs explained that governments preferred to hear clients’ perspectives through NPOs and not meet directly with clients. It is not clear what might be the government’s motivation, but one suggestion was as follows:

You know, they’re [government] always looking for a cohesive kind of consensualized kind of group that they can listen to and they have told us that off and on.... Just hearing a unified voice on any particular issue ... I think that it’s actually grown over the years.

It is important to flag this item because this preference on the part of certain governments to be presented with a unified perspective when there is a diversity of experiences among members of any marginalized group is, in effect, another form of exclusion.

The fourth and final set of conditions focused on *communities*. Four categories regarding community emerged from the data:

- a. size of the community and visibility of the policy issue (e.g., small-town residents and NPOs fully supported and advocated for a particular disability policy because a well-known community resident had that disability);
- b. community values regarding who is deserving and undeserving of social services (e.g., an NPO described a mid-size community where young moms on social assistance were viewed negatively by residents and a general sentiment seemed to exist about how they did not deserve services they received from governments);
- c. location of the community (e.g., in northern communities people had to travel long distances for advocacy meetings and to confront governments);

- d. crises in communities influenced advocacy work (e.g., a murder in a neighbourhood spawned a drive for policy change that was very different than if this crisis had not occurred).

## DISCUSSION AND IMPLICATIONS

The research design was intended to collect qualitative data. Merging the provincial and federal registered nonprofits and charities datasets, and then sorting by community name and location, size of community, and size of NPO, and then across a variety of marginalized groups, led to the creation of a heterogeneous sample. The phone interviews with NPOs resulted in a collection of qualitative data that help us to better understand the complex internal nature of advocacy processes. Future social policy advocacy research should focus on attaining a larger sample of NPOs using merged datasets, examine a variety of variables (e.g., organizational resources, environmental incentives, government regulations), and include marginalized groups as a constituency. In addition, another stream of qualitative research could sample marginalized individuals and ask about their perceptions and experiences of advocacy processes (e.g., did they feel included and valued, was their participation coerced, were they further stigmatized or traumatized during the process, how active were they and at which points in the processes, and were their policy needs met?).

This research contributes to the literature about NPO-facilitated policy advocacy that involves marginalized groups of people. The analyzed data reveals that NPOs engage marginalized groups in the majority of their policy initiatives (i.e., 67%). Some NPOs exclude marginalized groups by “speaking for” them and others by excluding them in policy advocacy work. When NPOs do this, they reinforce the exclusion and silence of marginalized groups. This is further reinforced when governments prefer to deal with NPOs directly rather than marginalized groups. Reasons for this observed preference are not clear, but it is possible that keeping marginalized people silent serves a neoliberal agenda (see, for example, Lightman, 2003, p. 256); in effect, social inequities are ignored and healthy public policy development is compromised.

Depending on how advocacy is operationalized by an NPO, it can create exclusion and non-participation, which is the antithesis of social justice (Fraser, 2003; Mullaly, 1997). Indeed, a nationwide U.S. study found that 88% of NPOs “never or rarely involve” their clients in advocacy (Salamon & Lessans Geller, 2008, p. 12); the difference between this rate of exclusion and that of this study (33%) is likely due to sample bias, because the present study deliberately sought to recruit NPOs that do advocacy *with* marginalized groups. In the exclusionary instances, the NPO sector may be viewed as an agent of government working toward social control (Shragge & Fontan, 2000) rather than social change and innovation. The implications of exclusion for democratic governance (Abelson et al., 2003; Brock, 2001; Orsini & Smith, 2007; S. Phillips, 2009) should be a concern for both governments and NPOs.

Policy advocacy is characterized by multiple types and fluid processes created by a variety of conditions. These conditions included NPO perceptions of marginalized people, their own organizations, the NPOs around them, governments, and communities. These NPO perceptions illuminate the complex nature of their advocacy behaviour and add further depth to the typology. These perceptions are related to some of the variables currently identified in the literature (e.g., an NPO’s perception of government receptivity is an environmental incentive/disincentive) (refer back to Mosley, 2010; Nicholson-Crotty, 2009; Salamon & Lessans Geller, 2008). Given the small sample size, it was not possible to discern a pattern in these

conditions. However, NPO perceptions of marginalized people as well as NPO organizational philosophy regarding civic engagement specifically and social justice generally appear to be salient variables.

Some of the findings point to the existence of “advocacy chill” while other findings do not. Cited literature leads one to believe that “advocacy chill” is common in Canada (Bridge, 2002; Bridge & Gilbert, 2005; Elson, 2008; S. Phillips, 2009; Scott, 2003). The results illuminate the presence, absence, and complex nature of “advocacy chill.” Some NPOs stated that government funding affects their advocacy work while others indicated it did not. In particular, some NPOs believe competition for government funding among NPOs reduces the formation of advocacy coalitions, thus advocacy chill appears to influence the type of advocacy. Some NPOs stated they are careful how they roll out advocacy such that they do not break any laws while others are not careful at all and believe advocacy is one of their primary NPO functions. Despite the heterogeneity of the sample, some NPOs working in certain sectors were not part of the sample (e.g., child care, literacy, international development), so generalizations beyond the sample set are limited. What is clear is that this chill has differential impacts across NPOs.

## CONCLUSION

This exploratory research fills a gap in the literature about NPO-facilitated policy advocacy with marginalized people. It offers some evidence to answer Mosley’s recent question: Are NPOs “advocating primarily in support of clients’ concerns”? (Mosley, 2009, p. 19). This evidence suggests that NPOs are advocating for their clients’ concerns. In some instances they are working *with* marginalized people and in other instances, they are working *without* marginalized people. This research suggests the need to reconsider the current list of advocacy variables (e.g., organizational constraints, political environment) that have an impact on NPO advocacy behaviour (Mosley, 2010; Nicholson-Crotty, 2009; Salamon & Lessans Geller, 2008).

More specifically, NPOs’ perceptions of marginalized people influence advocacy participation, including forms of involvement in different phases of advocacy processes. These results also shed light on a potential answer to Elson’s question, “What will Canada’s voluntary sector legacy be in relationship to social inclusion ... and social justice?” (Elson, 2004, p. 222). These findings indicate that some advocacy processes function as places of social inclusion for marginalized people and offer them an opportunity to make contributions to social policy (also see Jenson, 1998).

These results expose the internal complexity of NPO-facilitated advocacy with marginalized groups, for which there appears to be little Canadian primary data. Policy advocacy is characterized by multiple types and fluid processes. Social policy advocacy as a finite concept with clear defining lines and the routine involvement of marginalized communities in specific advocacy activities is not reflected across the NPO data. Social policy advocacy initiatives have life cycles characterized by fluidity over time. At any moment in time, an initiative may be driven by an NPO coalition but then transform into a round table with marginalized people and government involvement.

The one common element across the typology presented here is that NPOs’ daily service delivery work informs advocacy strategies; the data reveal a diversity of policy initiatives that directly benefit marginalized communities. Advocacy also appears to differ in scale and visibility across NPOs (e.g., simply voicing an opinion through a single NPO or undertaking province-wide advocacy involving 70 NPOs), contingent on a variety of conditions that change and interact over time. Some of these conditions may offer insight into the high level of non-participation of clients in other studies (Salamon &



Lessans Geller, 2008). Finally, “advocacy chill” affects some NPOs but not others and was shown to be complex in nature. Overall, NPO practitioners appear to have to strategize and balance a number of dynamic elements when doing advocacy work.

The advocacy typology developed here offers an initial blueprint of NPO-facilitated policy advocacy with marginalized groups. Taken together, the typology, the varied forms of marginalized people’s involvement, and the conditions that appear to influence types of advocacy create a preliminary theoretical sketch of the nature of policy advocacy processes as perceived by NPOs. What remains is to test the broader applicability of this blueprint to a larger and more diverse sample of social service NPOs that engage marginalized groups in policy advocacy in Canada.

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## NOTES

1. Neither the registered charities dataset nor the provincial corporations dataset use ICNPO, thus CRA codes relating to welfare, health other than hospitals, and provision of benefits to the community were used to extract relevant NPOs. Provincially registered NPOs were checked individually because they are simply classified as membership or charitable corporations.
2. Refer to Labonte & Edwards (1995), who implemented a similar method.

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