

## Population Change and Lifecourse Strategic Knowledge Cluster

### **Cluster Event: 27-28 March 2013 Introduction, Update, and Plans**

27 March

Income, Health, and Social Programs in an Aging Population

28 March

Data and Collaboration

Consultation on LifePaths

Updates and consultation on cluster activities

Knowledge Mobilization Training

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Dated: 6 May 2013

Besides introducing this Cluster Event of 27-27 March 2013, I want to use this opportunity to say a few words about the history and potential future of the Population Change and Lifecourse Strategic Knowledge Cluster. I will also offer some comments on conferences involving academic and public sector researchers.

## **History of the Cluster**

This history goes back to the Social Science and Humanities Research Council (SSHRC) competition for Strategic Research Cluster Design Grants (2004-05) and the subsequent Completion Grant (2005-06). Notice that these were called “research clusters” and that the basic idea was to help SSHRC design the appropriate format for these clusters.

SSHRC brought together the 31 successful applicants for Cluster Design Grants on 18 February 2005, in an occasion called “Designing the ideal cluster.” Besides the Cluster Design Grants, other large SSHRC grants were invited to this occasion, with each having a poster on exhibit. This provided an opportunity for possible collaboration across groups, and networking with potential partners.

At this occasion, Marc Fonda of SSHRC, Jean-Pierre Voyer of Policy Research Initiative, and Peter Hicks of Human Resources and Social Development Canada, proposed that three of the groups collaborate under an umbrella called “Population, Work and Family Policy Research Collaboration”.

The cluster where I was the Principal Investigator was called “Population Change and Public Policy,” with the aim of coming back to the Review of Demography and its Implications for Social and Economic Policy (1986-92). This Review had met its demise with federal budget cuts, at the same time as the Economic Council of Canada. The cluster led by Paul Bernard was entitled “Lifecourse and Bringing all the Threads Together.” This group was making the case that there were now Statistics Canada surveys on various parts of the life course, but there was a need for an overarching longitudinal survey. The cluster led by Craig Riddell was called Canadian Labour Research Cluster, and it has become the Canadian Labour Market and Skills Researcher Network (CLSRN). Craig Riddell had been involved earlier in the Royal Commission on the Economic Union and Development Prospects for Canada, 1982-85. It is useful to also note that each of the Principals was also associated with Research Data Centres, as were Byron Spencer and Céline Le Bourdais, who are on the Executive Committee of the Population Change and Lifecourse Cluster.

When the SSHRC cluster competition was announced, they were called Strategic Knowledge Cluster Grants. There were competitions in 2006-07 and 2007-08, with a total of 18 clusters funded, each at about \$2.0 million over seven years. Two of the Cluster Design Grants had come together in one application called Population Change and Lifecourse, and CLSRN was also successful. In this same period, SSHRC also allocated 20 Knowledge Impact in Society Grants, each of about \$300,000.

The designation as Strategic Knowledge Clusters essentially meant that the main purpose was not research itself but the conversion of research into knowledge. Various words have been used to advance these concepts. Dissemination may involve distribution of the research only within disciplinary groups, with little focused attention to a broader public. Knowledge Transfer or Knowledge Translation involves a broader public. Knowledge Mobilization can be described in terms of a cycle that starts with interaction with an interested public to determine the knowledge that is needed, then research is done and brought back to this interested public as further knowledge. Ultimately, these words can mean much the same thing, and we can refer to K\* rather than KT and KM. We can also usefully speak of the interface of the research cycle and the policy cycle. Research starts with a question, then research is done which raises further questions. Similarly, policy starts with an issue that is addressed in policy, raising further policy issues. Ideal would be for researchers and policy people to intersect in these cycles.

As seen in the grant application, the Population Change and Lifecourse Cluster sought to focus on things after the research and before the research (see Appendix A and especially the Cluster web site <http://sociology.uwo.ca/cluster/>). Knowledge mobilization has included syntheses, research briefs, policy briefs, and workshops. Other activities have involved data development, making data easier to use and getting greater access, especially to administrative longitudinal data. We have sponsored training, internships, and specialized workshops. We have also sponsored exchanges, for both faculty and students, and workshops involving academic and public sector researchers. While we have not funded student research directly, we have maximized student participation in workshops and conferences, including student presentations at professional conferences. Besides activities initiated by the cluster Executive Committee and Thematic Committees, we have administered member initiated activities through the following competitions and calls for proposals (due on: 15 January, 15 April, 15 June and 15 October):

- Data Development, Research Infrastructure, Technical Training, and Summer Schools or Short Courses
- Dynamic Computer Modeling Projects: Research Infrastructure and Technical Training
- Faculty Exchange
- Knowledge Mobilization Projects
- Graduate Student and Post Doctoral Student Competition for Funding of Internships, Trainings, Workshops and Conference Presentations
- Research Brief, Synthesis Paper, and Policy Brief

An overriding goal is that of networking. From the very outset, the Cluster established partnerships with key federal ministries. At Policy Research Initiative, Terrance Hunsley, later Alain Denhez, and now Katherine Antal of Policy Horizons Canada, have been members of the Cluster Leadership Group. At Human Resources and Social Development Canada, and later at Human Resources and Skills Development Canada, Peter Hicks, Gordon Lenjosek, Cliff Halliwell, and now John Rietschlin and François Weldon, have been our ambassadors. At Citizenship and Immigration Canada, it has been Elizabeth Ruddick and later Martha Justus. At

Statistics Canada, Rosemary Bender and Garnett Picot, and later Jane Badets. At Health Canada we had Mark Wheeler and now Sylvain Paradis. We subsequently included the Public Health Agency of Canada, where Beth Jackson has served as partner representative. At this time, there is a push to include Aboriginal Affairs and Northern Development Canada, where Marc Fonda would be the representative.

## **Central Concepts**

*Population change* can be analyzed in terms of population states (size, distribution and composition of population) and population processes (fertility, mortality, migration, and change in state). The study of population includes the macro and micro, along with the causes and consequences of population change. *Life course* studies include the central concepts that (1) life is longitudinal (2) and multifaceted (education, family, labour market, health, etc.), and (3) lives are linked and (4) lived in social context. The interplay of population change and life course brings attention to the following: life course transitions are often demographic. Macro demographic conditions are part of the context and determinants of life course transitions. Life course transitions, when added at the macro level, make for population change (size, distribution, structure, composition). The concepts of “multifaceted” and “lived in social context” overlap with the concept of “determinants of population change”. See the Cluster web site for a further elaboration of the “mission statement.”

Note that the Cluster uses a broad definition of its domain, including not only the intersection of population change and life course, but inclusive of research that considers either population change or life course analyses. Another way to appreciate the central concepts of the Cluster is through the names of our Thematic Committees: (1) Aging and paid work, (2) Caregiving and social participation, (3) Health over the life course, (4) Families, (5) Immigrants and migrants, and (6) Aging, lifelong learning and life course flexibility. The Cluster web site further elaborates the domains of these Thematic Committees.

## **Leadership Group**

The cluster is administered through a Leadership Group that includes an Executive Committee, Partner Representatives and Leaders of the Thematic Committees. There is also an Advisory Council. The people currently serving in these capacities are listed below:

### *Executive Committee:*

Rod Beaujot, Project Director, Western University  
Céline Le Bourdais, McGill University  
Susan McDaniel, University of Lethbridge  
Kevin McQuillan, University of Calgary  
Byron Spencer, McMaster University  
Zenaida Ravanera, Project Coordinator, Western University

*Partner Representatives:*

Martha Justus, Citizenship and Immigration Canada  
Sylvain Paradis, Health Canada  
François Weldon, Human Resources and Skills Development Canada  
Katherine Antal, Policy Horizons Canada  
Beth Jackson, Public Health Agency of Canada  
Jane Badets, Statistics Canada

*Thematic Committee Leaders:*

Ellie Berger, Nipissing University, Aging and paid work  
Janet Fast, University of Alberta, Caregiving and social participation  
Amélie Quesnel-Vallée, McGill University, Health over the life course  
Zheng Wu, University of Victoria, Families  
Barry Edmonston, University of Victoria, Immigrants and migrants  
Paul Bélanger, Université du Québec à Montréal, Aging, lifelong learning and life course flexibility

*Advisory Council:*

Don Drummond, Queen's University  
Janet Halliwell, J.E. Halliwell Associates  
François Héran, Institut National d'Études Démographiques  
Lorna Marsden, York University  
Anne Martin-Matthews, University of British Columbia  
Doug Saunders, The Globe and Mail  
Jean-Pierre Voyer, Social Research and Demonstration Corporation  
Frans Willekens, Netherlands Interdisciplinary Demographic Institute

**Networking through conferences with academic and public sector researchers**

From the outset, the PCLC cluster was involved in conferences with academic and public sector researchers. Led by the Policy Research Initiative, the Population, Work and Family Policy Research Collaboration (PWFC) organized four conferences: The Use of the Life-Course Framework in Policy Research, and “Flexicurity” (March 23-25, 2006), *Social Development and Economic Outcomes* (December 7-8, 2006), Social and economic well-being of Canada's population in 2017 (December 13-14, 2007), and Meeting Canada's diverse challenges: social risk, private risk and productivity (December 9-10, 2008). When these conferences were no longer continued, the Cluster joined Statistics Canada's Socio-Economic Conference in 2009 and 2010.

The participation of the Cluster at these conferences maximized the involvement of members, including student members in interactions with public sector researchers. It is worth observing that a number of people have participated in several of these occasions, providing a basis for continuity of interactions across academic and public sector researchers. One of the objectives is

for academic researchers, including students, to be aware of the research needs of partner agencies in the public sector, and for government agencies to be aware of ongoing academic research.

### **Cluster Event, Ottawa, 27-28 March 2013**

It is in the absence of such conferences that this Cluster Event of 27-28 March was organized. The event was organized around a meeting of the Leadership Group. As seen in the [program](#), the first day consists of a conference on “Income, health, and social programs in an aging population”. In the morning of the second day, there are sessions on “Data and Collaboration,” a Consultation on LifePaths, Updates and Consultation involving the Executive Committee and Thematic Committee leaders, finishing with a Knowledge Mobilization Training. Most of the presentations are being made available on the Cluster web site. Policy Briefs are being prepared for each of the four sessions of the 27 March conference, and summaries will be made available for other parts of the program.

Participation was by invitation, with an attendance of 106 persons over the two days (see Appendix B for attendance list). After inviting the Leadership Group and specific presenters, we assigned the task to the partner representatives to propose about some 10 people from their agency. We held a special student competition to bring about 10 graduate students who would profit from the Event in view of their research and career interests. Partly through the Thematic Committees, we also invited some 10 faculty members who would profit in terms of research collaboration. We also sought to invite others, from provincial governments and from other parts of the federal government. While there was no registration fee, we only paid the travel costs of presenters and Cluster members.

The 106 participants were as follows: 19 from the leadership group, 19 presenters and other faculty members, 14 graduate student members, 45 from federal partners (besides those in the Leadership Group), 3 from provincial governments, 3 from other parts of the federal government, and 3 others. The participants from partner agencies included 6 from Citizenship and Immigration Canada, 10 from Health Canada, 15 from Human Resources and Skills Development Canada, 1 from Policy Horizons Canada, 6 from Public Health Agency of Canada, and 13 from Statistics Canada. The faculty and students have come from 17 Universities: Institut national de recherche scientifique (INRS), McGill University, McMaster University, Memorial University, Mount Saint Vincent University, University of Alberta, University of British Columbia, University of Calgary, University of Guelph, University of Manitoba, Université de Montréal, Université du Québec à Montreal, University of Ottawa, University of New Brunswick, Western University, Wilfrid Laurier University, and York University.

In total, the 106 participants included 45 from universities, 51 from partner agencies and 10 others. It is worth noting that participants from partner agencies included 15 Directors or Directors General, including 4 who made “Commentaries” at the conference, and 5 who presented in the “Data and Collaboration” and “LifePaths” sessions.

### *Conference: Income, Health, and Social Programs in an Aging Population*

The two days were organized as plenary sessions to maximize interaction across participants. The four sessions of the conference were each 90 minutes, including two 20 minute presentations, a 10 minute commentary from someone in a policy position, 10 minutes of discussion at tables and 25 minutes of general discussion. People were systematically assigned to tables in order to have diversity at each table, with assigned chairs and note takers. The discussion was structured to focus on: (1) questions that need to be pursued and data that are needed, (2) implications and policy relevance, and (3) key issues for the Cluster to consider in the next year or two.

### *Data and Collaboration*

The “Data and Collaboration” session of 28 March originated from a suggestion by John Rietschlin, our partner representative at HRSDC, that was quickly supported by Sylvain Paradis of Health Canada, Martha Justus of Citizenship and Immigration Canada, and Heather Dryburgh of Statistics Canada. With reduced budgets for research within government, there is heightened interest to collaborate with academic sector researchers. This collaboration would also be a means of promoting various data sets that are becoming available. This includes in particular the use of administrative data for research.

For administrative data to be useful, various data development needs to take place, including documentation and often linkages to other administrative or census data. Much of the development and access is taking place in the Canadian Research Data Centre Network. The Cluster can be involved especially in the second and third of the three goals of CRDCN: (1) data access, (2) training in the use of complex data, including longitudinal administrative data, and (3) knowledge mobilization and impact. Another shared goal is the maximization of involvement on the part of academic sector researchers in this data development, in order to enhance the prospects for research and collaborations, which would have a public benefit.

Thus the Data and Collaboration session is first seeking to share knowledge on the data sets that are emerging. We are also seeking to determine how the Cluster can be of assistance, especially with regard to training to use the data and in supporting research collaboration. With regard to collaboration, we need to know what structures already exist to support collaboration between academic and civil servant researchers, and what further structures can be promoted. The structures that exist within the Cluster are those of “faculty exchange” and the “student competition” which sponsors periods of time away from their home institution, including student internships and apprenticeships. For each of the Cluster partners, we will be developing a web page to give information on: (1) data being developed, (2) research needs and priorities, and (3) opportunities for collaboration with faculty and students.

### *Consultation on LifePaths*

Micro-simulation and computer modeling are of particular interest to the Cluster, as a potential means of linking research and policy. A workshop on micro-simulation was held on 28 September 2011 (see <http://sociology.uwo.ca/cluster/en/2011SeminarModeling.html>). The posted documents from the workshop include “An inventory of Canadian Microsimulation models by Yann Décarie, Michaël Bossonneault and Jacques Légaré. The Cluster has a specific request for proposals on “Dynamic Computer Modeling Projects: Research Infrastructure and Technical Training.” Alain Belanger has received this funding to write a Textbook for MODGEN users.

The Modelling Division at Statistics Canada is undertaking a Consultation on LifePaths, and we wanted to be included in this consultation. We are also interested to know from Cluster members who would like to be included in the further consultation that will occur.

### *Update from cluster Executive Committee and Thematic Committees*

Besides the present document, see the [update](#) by Zenaida Ravanera and [Reports](#) of Thematic Committee leaders. Various suggestions were made for future Cluster activity. The suggestions raised during the meeting, in the reports from the Note Takers at each table on 27 March, along with suggestions made after the meeting, will all be taken up by the Executive Committee (see Appendix C – Suggestions Arising from Cluster March 27-28 Event).

### *Write for the Reader: Research Briefs*

In the afternoon of 28 March, Matthew Shulman led a workshop on “Write for the Reader” that included guidelines on writing Research Briefs. Participants were assigned specific articles with request to start work on the associated Briefs during the workshop, with subsequent submission of the briefs for release by the Cluster.

### **For the future**

The cluster was funded as of the end of the 2006-07 budget year, but activities started in 2007-08, with the last installment arriving in 2013-14. Given the budgetary carry forward, we would have funds to operate into the 2015-16 budget year (see Appendix D – Revenue and Expenditure as of 20 March 2013). Besides the activities funded through the various competitions and those of the Thematic Committees, there needs to be a discussion of the Cluster priorities for these coming years. We have asked the various tables to report back on priorities that the Cluster should pursue in the next few years (see Appendix C). The Executive Committee will need to make decisions on these priorities, along with the corresponding approaches and whether structures are needed beyond those that are already established (for data development, knowledge mobilization, workshops, syntheses, briefs, exchanges, training, internships).



It would appear that syntheses would be particularly valuable. These might take the format of syntheses published in Canadian Public Policy or the Annual Review of Sociology. They should summarize where we are on a given topic of importance to the cluster and what further research is needed. These kinds of syntheses require direction from people who are on top of a given field, and who are connected to the priorities of our partners. The following are syntheses that have been supported by the Cluster:

- Décarie, Y., M. Bossonneault and J.Légaré. 2011. [An inventory of Canadian Microsimulation models](#)
- Brennenstuhl, Sarah, Amélie Quesnel-Vallée, and Peggy McDonough. 2012. [Welfare regimes, population health and health inequalities: a research synthesis.](#)
- Cooke, M. 2013. The Social and Health Service Needs of Aboriginal Peoples in Smaller Urban Centers in Southern Ontario: A Synthesis Paper for Service Agencies. See [Discussion Paper 2013-01.](#)
- Curtis, L.J., Female baby boomers head into retirement: Are they ready? (In progress).

Another consideration is whether to have another conference, how it should be organized, and what other stakeholders might be involved. We have received considerable encouragement to have another conference like the present one, inviting about 100 people, organized as a plenary and maximizing the opportunities for interaction across academic and public sector researchers on questions of research, data, and policy. If we have another conference of this nature, where only a minority of the research of cluster members is presented, we need to ensure that other Cluster members can profit from the conference, and we need further mechanisms through which the research occurring in the Cluster becomes available within and beyond the Cluster.

To continue beyond March 2014, we also need to make a case to SSHRC. There is always the alternative of returning our surplus funds, and we need to ensure that we leave a legacy and continuity that justifies these expenditures in the public interest.

In making this case, two members of the Cluster Advisory Council (Janet Halliwell and Anne Martin-Matthews) made useful summary comments:

- We are making a difference, especially in regard to the linkage between the research and policy sectors.
- Continue with our substantive goals, adapted to the changing context. Also appreciate the costs of inaction.
- Our main goals should be in the following areas: big data (a portal for data users), collaboration with federal departments, synthesis papers, briefs, consultation on data.
- It is rare to have a funding envelop that helps promote data development and collaboration.

## Appendix A. Projects and Activities, Population Change and Lifecourse, to March 2013 (ordered by dates when projects were approved)

### Knowledge Mobilization Projects – Requests for Proposals

- Juby, H., & Ravanera, Z. (2008). New researcher/student training on Knowledge Translation. [4.4.1] **[Completed]**
- LeBourdais, C., Poirier, J., Tremblay, M. D., & Juby, H. (2009). Des statistiques sociales aux politiques publiques: Le défi des données probantes. [4.4.2] **[Completed]**
- McDaniel, S., Fast, J., Chappell, N., & McMullin, J. (2009). Siciliano forum: Global aging in the 21st century: Challenges and opportunities. [4.4.3] **[Completed]**
- Chong, P. (2009). Canadian Population Society Graduate Research Development Conference. [4.4.4] **[Completed]**
- Edmonston, B., & Fong, E. (2009). Publication of *Canada's Changing Population* and related knowledge mobilization activities. [4.4.5] **[Completed]**
- Bernard, P. & McDaniel, S. A. (2009). Special issue of *Canadian Public Policy* on 'The Lifecourse as a Policy Lens.' [4.4.6] **[Completed]**
- McDonough, P., Quesnel-Vallée, A., & Brennenstuhl, S. (2009). Socioeconomic inequalities in health and the Welfare State: A research synthesis. [4.4.7] **[Completed]**
- Gilliland, J. (2010). Children's health and the environment: International workshop on research, policy and practice. [4.4.8] **[Completed]**
- Richards, J. L. (2010). Knowledge mobilization workshop: Using community action to broaden understanding of caregiving and seniors housing issues in an aging population. [4.4.9] **[In Progress]**
- Cooke, M. (2010). Aboriginal employment symposium, June 10, 2010, Waterloo. [4.4.10] **[Withdrawn]**
- Gauvreau, D. (2010). Understanding the populations of the past: New developments and interdisciplinary perspectives, FCD Conference. [4.4.11] **[Completed]**
- Edmonston, B. (2010). A life course perspective on immigrants and Immigration Policy, an International Metropolis Workshop. [4.4.12] **[Completed]**
- Gaudet, S., Lévesque, M., & Burlone, N. (2010). Penser la famille et les transitions de vie, repenser les politiques publiques. [4.4.13] **[Completed]**
- Cooke, M. (2010). Characteristics and key needs of urban aboriginal populations in Southern Ontario: A research synthesis. [4.4.14] **[Completed]**
- Gauvreau, D., & Poirier, J. (2011). Deux propositions de colloques du CIQSS au 79e congrès annuel de L'ACFAS : (1) La politique québécoise des services de garde; (2) La fin des recensements? [4.4.15] **[Completed]**
- Fast, J. (2011). Canadian Research Data Centre Network National Conference 2011: Coming of age. The Policy impact of an aging population. [4.4.22] **[In Progress or Withdrawn]**

- Fast, J. (2011). Costs of having employees with significant care responsibilities: A knowledge synthesis. [4.4.23] **[In Progress]**
- Gauvreau, D. (2011). Statistiques sociales, pauvreté et exclusion sociale: Perspectives québécoises, canadiennes et internationales. Conference and publication. [4.4.24] **[Completed]**
- Hallman, S., Fthenos, G., & Ménard, F. P. (2011). Canadian Population Society Graduate Research Development Conference. [4.4.16] **[Completed]**
- Fast, J. (2012). Reducing the Economic Costs of Family/Friend Care: Engaging Stakeholders [4.4.18] **[In Progress]**
- Kim, A. H. (2012). Outward and upward mobilities: Families from South Korea in a Transnational Era: International workshop. [4.4.19] **[Completed]**
- Curtis, L. J. (2012). Female baby boomers head into retirement: Are they ready? A research synthesis. [4.4.20] **[In Progress]**
- Hallman, S., Fthenos, G., Ménard, F. P., Fortin, S. (2012). Canadian Population Society Graduate Research Development Conference. [4.4.21] **[Completed]**
- Clark, S., Le Bourdais, C., & Quesnel-Vallée, A. (2012). Conference on "International perspectives on family structure and child well-being." [4.4.25] **[In Progress]**
- Gauvreau, D. (2013). Appui au colloque méthodes statistiques et statistiques publiques : Éléments clés pour la recherche et la gouverne. [4.4.26] **[In Progress]**
- Islam, M. K. (2013). Canadian Population Society Graduate Research Development Conference. [4.4.27] **[In Progress]**
- Wu, Z. (2013). Workshop on Aging Families. [4.4.28] **[In Progress]**

#### **Knowledge Mobilization Projects – Events and Director-initiated Projects**

- PCLC. (2008). Pre-PWFC symposium event. Training on Knowledge Mobilization.
- Canadian Population Society. (2009). Canadian Population Society 2009 Annual Meeting.
- Federation of Canadian Demographers. (2009). IUSSP International Population Conference. Marrakech, Exhibit on Canada.
- Beaujot, R., & Aysan, M. (2009). Documenting change in Statistics Canada's *Daily*.
- PCLC. (2010). Micro-simulation workshop and Statistics Canada Methodology Conference workshop: From traditional demographic calculations to projections by microsimulations.
- PCLC. (2011). Meeting with the province of Ontario Ministries.
- PCLC. (2011). Statistics Canada - Socio-Economic Conference.
- Légaré, J. (2011). Inventory of Canadian Microsimulation models.
- Burch, T. (2011). Presentation on computer modeling.
- Quesnel-Vallée, A., Renahy, E. Kamanzi, P. C., Corbett, B., & Heisz, A. (2012). Session on "Data Development" at Canadian Research Data Centre Network 2012 National Conference, Fredericton, 23-24 October 2012.

### **Data Development Projects**

- Dooley, M., Payne, A. A., & DeCicca, P. (2009). Using administrative data to analyze the determinants of success in university.
- Quesnel-Vallée, A., & Renahy, E. (2009). Functional databases for longitudinal analyses: The case of the National Population Health Survey in Canada.
- Laplante, B., & Street, M. C. (2009). SLID for Stata: Automating the transfer and documentation of the SLID data files into ready to use bilingual Stata files.
- Gauvreau, D. (2011). Appui à la préparation et à la réalisation de quatre modules de formation dans le cadre de l'École d'été du CIQSS 2011.
- Cooke, M., & Haan, M. (2011). Congress 2011 Symposium: New uses for government administrative data: Opportunities for evidence-based policymaking in Canada.
- Laplante, B. (2011). YITS for Stata and SPSS: Automating the transfer and documentation of the YITS data files into ready to use Stata and SPSS files. [**In Progress**]
- Corbett, B. (2012). Developing Gini and Zinga indexes for the analysis of contextual income inequalities within Canada: Data development and research infrastructure. [**In Progress**]
- Haan, M. (2012). Legislative requirements surrounding the storage and use of provincial administrative data by academics in academic institutions. [**In Progress**]
- Gauvreau, D. (2013). Introduction aux techniques récentes d'évaluation des politiques publiques, (1) Analyse de données administratives' et (2) Les modèles de micro-simulation et leurs applications. [**In Progress**]

### **Dynamic Computer Modeling Projects**

- Belanger, A. (2011). Computer modeling project: A textbook for MODGEN users. [**In Progress**]

### **Faculty Exchange**

- Haan, M. (2008). Household formation and homeownership among immigrants in Canada (at Statistics Canada).
- Fast, J. (2008). Canadian and UK exchange on costs of family/friend care.
- Legare, J. (2009). Canada and UK exchange on support networks for the elderly.
- Liu, J. (2011). Developing a network with Chinese institutes: Exchange with various universities in China. [**In Progress**]

## Appendix B. Participants at Cluster Event, Ottawa, 27-28 March 2013

No.	Last Name	First Name	Position	Affiliation
1	Badets	Jane	Director General	Social and Demographic Statistics, Census Subject Matter, Statistics Canada
2	Beaujot	Roderic	Emeritus Professor of Sociology	Department of Sociology, Western University
3	Bélangier	Alain	Professeur agrégé et Directeur des programmes de démographie	Centre Urbanisation Culture Société, Institut national de la recherche scientifique
4	Berger	Ellie	Associate Professor of Sociology	Sociology, Faculty of Arts & Science, Nipissing University
5	Boissonneault	Michael	MA Candidate, Demography	Département de démographie, Université de Montréal
6	Bourbeau	Robert	Professeur titulaire de démographie	Département de démographie, Université de Montréal
7	Bowles	Stefanie	Senior Policy Researcher	Policy Horizons Canada
8	Brown	Amelia E	Senior Policy Analyst	Policy Integration, Human Resources and Skills Development Canada
9	Carrière	Yves	Manager	Data Development and Research Dissemination Division, Health Canada
10	Carroll	Annie	Policy Analyst	Horizontal Policy Development and Coordination, Citizenship and Immigration Canada
11	Carter	Renée	PhD Candidate, Epidemiology	International Research Infrastructure on Social Inequalities in Health, McGill University
12	Cooke	Martin	Associate Professor of Sociology	Sociology and the School of Public Health and Health Systems, Faculty of Applied Health Sciences, University of Waterloo
13	Curtis	Lori	Professor and the Director of the South Western Research Data Centre	Department of Economics, University of Waterloo
14	Dea	Christian	Director General	Knowledge and Data Management, Human Resources and Skills Development Canada
15	Décarie	Yann	Étudiant au doctorat en démographie	Centre Urbanisation Culture Société, Institut national de la recherche scientifique
16	Denis	Johanne	Director	Demography, Statistics Canada
17	Dhawan-Biswal	Urvashi	Director	Social Research, Human Resources and Skills Development Canada
18	Dryburgh	Heather	Director	Microdata Access, Statistics Canada
19	Duguay	Eric	Project Manager	In-Person Strategies and Policy, Service Canada
20	Dupuis	Michèle	Senior Program Integration Officer	Knowledge Integration Division, Social Sciences and Humanities Research Council of Canada
21	Edmonston	Barry	Adjunct Professor of Sociology	Department of Sociology, University of Victoria

22	Fast	Janet	Professor of Human Ecology	Department of Human Ecology, University of Alberta
23	Feng	Yan (Sarah)	Epidemiologist	Social Determinants and Science Integration Directorate, Public Health Agency of Canada
24	Ferrer	Ana	Associate Professor of Economics	Department of Economics, University of Calgary
25	Finlay	Tara	Senior Policy Analyst	Health Care System Division, Health Canada
26	Fonda	Marc	Senior Research Manager	Knowledge Transfer Section, Aboriginal Affairs and Northern Development Canada
27	Fortin	Myriam	Manager, Strategic Policy	Families, Youth and Children, Human Resources and Skills Development Canada
28	Fthenos	Georgios	Ph.D. Student, Sociology	Department of Sociology, Western University
29	Gallagher	Gerry	A/Director General	Social Determinants and Science Integration Directorate, Public Health Agency of Canada
30	Garvie	Philippe	Agent de recherche	Régie Régionale De La Santé Et Des Services Sociaux De L'Outaouais Direction De La Santé Publique
31	Greenberg	Lawson	Unit Head	Integration and Analysis, Statistics Canada
32	Haan	Michael	Associate Professor of Sociology and Economics	Sociology and Economics and Canada Research Chair in Population and Social Policy, University of New Brunswick
33	Halliwell	Janet	Principal and Chair of the Board and President	J.E. Halliwell Associates Inc.
34	Hallman	Stacey	PhD Candidate, Sociology	Department of Sociology, Western University
35	Harder	Sandra	Director General	Strategic Policy and Planning, Citizenship and Immigration Canada
36	Harty	Siobhan	Director General	Social Policy, Human Resources and Skills Development Canada
37	Hébert	Benoît-Paul	Senior Research Advisor	Seniors, Life Course and Disabilities, Human Resources and Skills Development Canada
38	Heisz	Andrew	Chief	Longitudinal and International Study of Adults, Statistics Canada
39	Hicks	Chantal	A/Director	Modelling Division, Statistics Canada
40	Hicks	Peter		
41	Higgins	Benjamin	Master's Student, Sociology	Department of Sociology, University of Calgary
42	Hogan	Laurie	Program Officer	Senior's Policy, Human Resources and Skills Development Canada
43	Hopkins	Mark	Director General	Economic Policy Directorate, Human Resources and Skills Development Canada
44	Hou	Feng	Principal Researcher	Social Analysis, Statistics Canada

45	Islam	Kamrul	PhD Candidate, Sociology	Department of Sociology, University of Alberta
46	Jackson	Beth	Manager	Equity Analysis and Policy Research, Public Health Agency of Canada
47	Justus	Martha	Director	Strategic Research, Citizenship and Immigration Canada
48	Keefe	Janice	Professor; Director, Nova Scotia Centre on Aging and Lena Isabel Jodrey Chair in Gerontology Caregiving Policy	Department of Family Studies and Gerontology, Mount Saint Vincent University
49	Knowles	Ruby	Executive Director	Continuing Care Program, Health and Wellness, Government of Nova Scotia
50	Laberge	Maude	Policy Analyst	Health Care System Division, Health Canada
51	Le Bourdais	Céline	Professor of Sociology; Canada Research Chair in Social Statistics and Family Change	Department of Sociology, McGill University
52	Lee	Sharon	Professor of Sociology	Department of Sociology, University of Victoria
53	Légaré	Jacques	Professeur émérite de démographie	Département de démographie, Université de Montréal
54	Lero	Donna	Associate Professor	Department of Family Relations and Applied Nutrition, University of Guelph
55	Ljutic	Malik	Senior Economist	Employment and Demographic Issues Unit, Finance Department, Government of Ontario
56	Lu	Hu	Research Manager	Health Policy Research Division, Health Canada
57	Margolis	Rachel	Assistant Professor of Sociology	Department of Sociology, Western University
58	Marsden	Lorna	Professor of Sociology and President Emerita	Department of Sociology, York University
59	Martens	Patricia	Professor	Department of Community Health Sciences, Faculty of Medicine, University of Manitoba
60	Martin-Matthews	Anne	Professor of Sociology	Department of Sociology, University of British Columbia
61	Masferrer	Claudia	PhD Candidate, Sociology	Department of Sociology, McGill University
62	McQuillan	Kevin	Professor of Sociology	Department of Sociology, University of Calgary
63	Ménard	Pierre-Olivier	Agent de recherche	Direction de la recherche et de l'analyse prospective, Ministère de l'Immigration et des Communautés culturelles, Gouvernement du Québec
64	Nazif Munoz	Jose Ignacio	PhD Candidate, Sociology	Department of Sociology, McGill University
65	Nyandwi	Marie Rose	Manager	Social Development Policy, Human Resources and Skills Development Canada
66	Ouellet	Nadia	MA Candidate, Sociology	Department of Sociology, University of Victoria

67	Paradis	Sylvain	Director General	Applied Research and Analysis Directorate, Strategic Policy Branch, Health Canada
68	Quesnel-Vallée	Amélie	Associate Professor of Sociology	Department of Sociology, joint position with Epidemiology, Biostatistics and Occupational Health, McGill University
69	Rahmania	Dorna	Policy Officer	Labour Market Access and Client - Centered Program Policy, Citizenship and Immigration Canada
70	Ramage-Morin	Pamela	Senior Analyst	Health Analysis, Statistics Canada
71	Ravanera	Zenaida	Project Coordinator	Department of Sociology, Western University
72	Rietschlin	John	Manager	Seniors, Life Course and Disabilities, Human Resources and Skills Development Canada
73	Rosher	Albert	Senior Policy Analyst	Policy Integration and Innovation, Citizenship and Immigration Canada
74	SanMartin	Claudia	Senior Analyst	Health Analysis, Statistics Canada
75	Schellenberg	Grant	Assistant Director	Social Analysis, Statistics Canada
76	Schirle	Tammy	Associate Professor of Economics	Department of Economics, Wilfrid Laurier University
77	Sethi	Bharati	PhD Candidate, Social Work	Faculty of Social Work, Wilfrid Laurier University
78	Shulman	Matthew	Executive Director	Peel-Halton-Dufferin Adult Learning Network
79	Smith	Michael	Professor and Department Chair, Sociology	Department of Sociology, McGill University
80	Spencer	Byron	Professor of Economics	Department of Economics, McMaster University
81	Spielauer	Martin	Senior Research Analyst	Modelling Division, Statistics Canada
82	Stankiewicz	Agatha	Policy Analyst	Equity Analysis and Policy Research Team, Social Determinants and Science Integration Directorate, Public Health Agency of Canada
83	Stinchcombe	Arne	Research Analyst	Division of Children, Seniors and Healthy Development, Public Health Agency of Canada
84	Tardif	Charles	Director, Health System Research and Forecast	Health Policy Research Division, Health Canada
85	Telake	Daniel S	Research Advisor	Seniors, Life Course and Disabilities, Human Resources and Skills Development Canada
86	Thornton	Nancy	Senior Policy Advisor	Early Intervention and Disease Prevention Policy, Health Canada
87	Tipenko	Elena	Research Analyst	Policy Analysis and Forecasting Division, Health Canada
88	Tousignant	Sylvie	Agent de recherche	Observatoire Compétences – Emploi, sur la formation continue et le développement des compétences, Université du Québec à Montréal
89	Townsend	Thomas	Instructor	Centre on Public Management and Policy, University of Ottawa



90	Trainor	Cathy	Chief	Canadian Community Health Survey, Statistics Canada
91	Turcotte	Julie	Chief, Structural Analysis	Structural Analysis, Finance Canada
92	VanAmburg	Jonathan	Senior Policy Analyst	Policy Integration and Innovation, Citizenship and Immigration, Canada
93	Varona-Marín	Danniel	Research Assistant	Learning Policy Research, Human Resources and Skills Development Canada
94	Veall	Michael	Professor of Economics	Department of Economics, McMaster University
95	Vezina	Samuel	Étudiant au doctorat en démographie	Centre Urbanisation Culture Société, Institut national de la recherche scientifique
96	Voyer	Jean-Pierre	President	Social Research and Demonstration Corporation (SRDC)
97	Wang	Feng	Epidemiologist	Social Determinants and Science Integration directorate, Public Health Agency of Canada
98	Wannell	Brenda	Chief	Integration and Analysis, Statistics Canada
99	Wareham	Michelle	Policy Analyst	Family and Care, Human Resources and Skills Development Canada
100	Weldon	François	Director General	Policy Research Directorate, Human Resources and Skills Development Canada
101	Wilson	Stephanie	Senior Policy Advisor	Director General's Office, Health Canada
102	Wolfson	Michael	Professor and Canada Research Chair in Population Health Modelling/Populomics	Department of Epidemiology and Community Medicine, University of Ottawa
103	Wright	Laura	PhD Candidate, Sociology	Department of Sociology, Western University
104	Wu	Zheng	Professor of Sociology	Department of Sociology, University of Victoria
105	Yu	Meng	PhD Candidate, Sociology	Department of Sociology, Memorial University
106	Zhu	Yibin (Albert)	Policy Analyst	Policy Analysis and Forecasting Division, Health Canada

## Appendix C

### Suggestions Arising from the Cluster March 27-28 Event, Ottawa

#### A. Knowledge Mobilization:

- Package some key messages around the overarching issue of population ageing and lifecycle and what it means for agenda of HRSDC – especially on the social programming (policy interest includes understanding the impact of demographic change on families, financial pressures on families, income security challenges). Deliver these to senior management – including ADM and DM.
  - For example, the work Mike Veall could be distilled in one smart message on what to do or not to do for seniors/older workers.
  - Across various thematic groups, look into what messages (on seniors/older workers, health, immigration) can be drawn and brought together in a story narrative for the benefit of persons at the ADM/DM level.

(Urvashi Dhawan-Biswal)

- Do more research synthesis (Janet Halliwell)
- Make use of webinars to connect with policy people, including at the provincial level (Janice Keefe)
- Conference on Family Poverty – could be held in conjunction with the 2014 Annual Meeting of the Canadian Population Society (Zheng Wu)
- Exhibit booth at the 27<sup>th</sup> Conference of the International Union for the Scientific Study of Population in Busan, South Korea; support participation of students and faculty; support for bid to hold 2017 IUSSP Conference in Canada (Jacques Légaré)
- Greater visibility in Annual Meetings of the Population Association of America through special sessions (Rachel Margolis, Barry Edmonston)
- Develop Briefs for specific Federal Departments, including SSHRC (Janet Halliwell)
- Collaborate with given ministries in integrated knowledge transfer (Beth Jackson)
- Have a session at the meetings on research/policy interface, and involve the Thematic Committees in this interface (Anne Martin Matthews)

#### B. Student Training:

- Student internship in Nova Scotia Continuing Care on inter-provincial policies affecting caregivers. (Janice Keefe and Ruby Knowles)
- Internship for Immigration Studies -- Internships are available for graduate student research at Citizenship and Immigration Canada (CIC). These internships allow students to access CIC data for research purposes, such as longitudinal studies of citizenship acquisition or conversion of student visas to permanent residency. (Martha Justus and Barry Edmonston)
- Provide training at the regional level (Michael Haan)
- Traineeship at Statistics Canada

- A competition would be run jointly by the Population and Life Course Cluster and STC to identify PhD candidates who would benefit from accessing data at STC in order to write their dissertation)
- A stipend would be provided by the Population and Life Course Cluster to cover the living expenses of the students while they are living and working in Ottawa
- The contribution that these students make to STC, as deemed employees, will have to be determined.
- How the overhead costs associated with the program are handled will have to be determined.
- In terms of timelines, a call for applications would likely be made this Spring, with the submission and adjudication of applications done in late summer, and successful applicants starting at STC in the fall of 2013.
- Input from STC's Human Resources group will be required to ensure that the program is consistent with hiring policies that have been established in the wake of Work Force Adjustment

(Grant Schellenberg and Céline Le Bourdais)

- Internship at Health Canada (Sylvain Paradis)
- Internship at Public Health Agency of Canada, especially at Social Determinants and Science Integration Directorate (Beth Jackson)
- Promote mentoring, following on experiences at CIHR (Anne Martin Matthews)
- Engage university VPs for Research to develop training strategies in the use of administrative data, simulation techniques (Lorna Marsden)

### **C. Micro-simulation**

- Develop training courses, “package” courses into 10 to 15-minute video-recorded segments (Michael Wolfson)
- Use Briefs to put out parts of the material (Céline Le Bourdais)

### **D. Collaboration on Data**

- Pre-conference on Longitudinal and International Study of Adults (LISA) at the 2013 CRDCN Conference at Waterloo (Lori Curtis, Andrew Heisz)
- Possible research collaboration with Statscan researchers using administrative data such as LWF, 1991 Census/LWF, Inter-provincial worker data base, Harmonized Census files (Grant Schellenberg, Michael Haan)
- There is need for indicators on aboriginal status in various files (Marty Cooke)
- There is need for information on health of persons in institutions (Jacques Légaré)
- The research community needs to be involved in the development of data sets provided by government (Byron Spencer)
- Linked data need to be validated before being made available for research (Urvashi Dhawan-Biswal)

## **E. Partnership and Membership**

- Include Aboriginal Affairs and Northern Development Canada as partner (Marc Fonda and Eric Guimond)
- Invite participants to the 27-28 March to become members:
  - Presenters
  - Public sector people (participants from the Partner Federal Agencies, Provincial Governments, Other Agencies (Finance, for example))
  - Others – Peter Hicks, Thomas Townsend
- Collaborate with CRDCN on matters of syntheses, data development and training (Michael Haan, Byron Spencer, Rod Beaujot)

## **F. Suggested topics for Cluster to pursue**

(Zenaida Ravanera has used the list of items from March 27 note takers in Section G below to propose the following suggested topics)

### **1. Population change and inequality**

Population dynamics relating to fertility, mortality, union formation and dissolution, and immigration have changed (and continue to change). How are these population dynamics related to inequality? Topics that could be examined include: fertility, cohort sizes entering the labour force and inequality; mortality, aging, and inequality; cohabitation, marriage, divorce and inequality; and immigration and inequality.

### **2. Consequences of inequality**

Studies point to the adverse effects of inequality on health and mortality. Does inequality influence the other population dynamics as well? Does inequality have an impact on fertility, union formation and dissolution, and immigration? Do the effects of inequality differ by age groups, by gender?

### **3. Immigrant integration**

How do levels of immigration relate to the integration of immigrants? Is type of immigration (economic, family reunification, refugees) a major determinant of integration? For temporary workers, what level of integration is aimed at? Are the 2<sup>nd</sup> generation immigrants better integrated than the 1<sup>st</sup>? Does geography and geographic mobility matter?

### **4. Longevity, retirement and inequality**

With longer life expectancies and longer periods of healthy aging, retirement would most likely continue to be delayed. What are the social and economic implications for society and individuals? A longer stay in the labour force enables parents to support their children longer; but, this in turn reduces the number of jobs available to new entrants into the labour force. Does delayed retirement contribute to inter-generational equity? Some

occupations are more conducive to delayed retirement. Do changes in mandatory retirement increase inequality among the elderly?

#### 5. Longevity and Public Policies

The elderly population, 80 years and older, will continue to increase. What are the demographic (gender, immigration status, aboriginal status, area of residence) and socio-economic (education, language, work status, income, health, housing) profiles of the elderly? What are the policies that impact on their well-being? How are other countries with similar age structures (Japan, Germany) dealing with their elderly populations, especially in terms of care giving?

#### 6. Gender equity and population change

How has the evolution toward gender equity been influenced by population dynamics? It seems apparent that over a life course, reduction in fertility has positively contributed to gender equity. However, at certain life course stages, child-bearing is still a cause of work and income disparity between men and women. What is the overall impact of fertility change on gender equity? Changes in union formation and dissolution affect men and women differently. How have the changes affected gender equity? Life expectancies of men and women seem to be converging. Does this have an effect on union formation at older ages? If so, does this contribute to gender equity?

#### 7. Values and public policies

Values and behaviour affecting families, work, education, and social relations have changed and continue to change, and these values are seen to be relevant to policies. What are the value changes that should be taken into account in social policies? Could values and behaviours be incorporated in policy modeling (such as micro-simulations)?

**G. Selected items from the Note Takers at 27 March Discussion Tables** (roughly arranged by session topics)

#### **Population Change and Inequality**

- Socioeconomic mobility (including intragenerational mobility)
- Implications of demographic composition for income inequality
- Inverse care: why people who need health services most are not taking advantage of available public services; is the unequal distribution of services as strong as income inequality, and how does this comparison differ across countries
- Need data on household income; impact of family composition – single-person households typically have only one source of income
- Examine inequality further: among older age groups (70+), immigration status, aboriginal population; disaggregate inequality by education – data could be from various sources: link LAD to Census, health data, administrative data, survey data

- Examine effect of inequality on health costs, on mortality
- Effects of income inequality, such as on health; income inequality among the old-old, or those over 80 years old; how to support seniors in their frail years
- Intergenerational equity – young people entry into labour market, older people's need to remain in the labour force
- Distinguish between poverty and inequality
- Use lifecourse perspective rather than cross-sectional approach to inequality
- Composition of population changes and how that can be related to inequalities
- Separate effects of level of immigration from effects of immigrant composition
- Intergenerational mobility – research on 2<sup>nd</sup> and 3<sup>rd</sup> generation immigrants
- Examine causes of inequality and how they differ between the US and Canada – too much money to top 1% or unequal access to education and health care services?
- Link family formation later in life to income and poverty, to social support and care giving

### **Labour Demand and Supply**

- Relationship between levels of immigration and integration
- Determinants of successful integration of immigrants (education level vs. workplace literacy)
- How to measure success of immigrants when they arrive with varying credentials.
- Geographic dispersion of immigrants; have geographic dispersion programs worked?
- Why do healthy immigrants become unhealthy? Does de-skilling have an impact on the health of immigrants?
- Reliability of microsimulation projections
- Role of higher education in the mismatch of labour demand and supply, and in credential inflation
- Examine job mobility of immigrants
- How to integrate temporary workers
- In examining immigrant outcomes, distinguish between types of immigration: economic, family reunification, and refugees.
- Examine returns to education, especially, income distribution of university graduates
- Examine geographic mobility of immigrants and how this differs by occupations
- Examine roles of apprenticeships and skilled trades in labour markets
- Examine provincial nominee programs – how successful in meeting labour shortage, how they differ across Canada, how well provincial nominees do over time

### **Longevity and Retirement**

- Effect of changes to mandatory retirement policies on income inequality between older Canadians, and between older and younger Canadians
- Explore potential of LifePaths to incorporate behavioural changes

- Though informative for projection and policy-making, data on how people think, plan, and prepare for the future are absent
- How to obtain and maintain employment at later life; what kind of occupations should they be allowed to have
- Social and economic implications for individuals and society of postponing retirement
- Micro-simulation is a complex model, and a “black box”, especially to federal agency representatives
- No data currently collected on income sources from private pension schemes

### **Longevity, Health and Inequality**

- Combine pure research on the social determinants of health with applied research on policy driven projects focusing on specific illnesses
- Long-term care and home care in the public system
- Help make data available, especially on health information between 55 and 60; examine relationship between health and labour force (exit and re-entry), disability benefits, welfare, and re-training.
- On relationship between researchers and policy-makers, is the Manitoba experience exceptional? How does it compare with those in other provinces?

## Appendix D. Revenue and Expenditure as of 20 March 2013

### Revenue (SSHRC)

2006-07:	\$150,000
2007-08:	300,000
2008-09:	298,500
2009-10:	298,500
2010-11:	300,000
2011-12:	300,000
2012-13:	300,000
2013-14:	150,000 (anticipated)
Total	\$2,097,000

### Expenditure (SSHRC)

2006-07	0
2007-08:	\$33,184
2008-09:	172,535
2009-10:	182,676
2010-11:	229,102
2011-12:	247,385
2012-13:	188,805 *
Total	\$1,053,687

\* to 28 Feb 2013, not including Thematic Committees

### Expenditure (SSHRC) by category (to 28 Feb 2013)

Management/Administration(1)	\$465,617
Meetings of Leadership Group and Council	33,775
Thematic Committee activities (to April 2012)	67,168
Release Allowance and RTS	50,535
Students:	
Fellowships for short courses	15,864
Students away from home university	18,572
Student conference travel	110,082
Student internship/apprenticeship	6,702
Faculty exchange	20,637
Faculty travel	4,625
Web development	7,079
Communications expert	850
RFP in Knowledge Mobilization	96,224
KM events - Director initiated	106,600
KM: Briefs	8,495
RFP in Data development	40,863
Total	\$1,053,688

1) Includes computer hardware and supplies



<b>Committed (SSHRC)</b>	
Co-investigators (TC) as of 2012-13	\$79,914
Co-investigators (TC) for 2013-14	21,375
Co-investigators (Spencer)	50,000
March 27-28 Conference	90,000
Committed: projects:	46,720
Total	\$288,009

<b>Balance SSHRC</b>	
Total income	\$2,097,000
Expenditures	1,053,687
Committed	288,009
Balance	\$755,304

<b>Revenue (other)</b>	
<b>Western University</b>	
Faculty of Social Science	\$70,000
V-P Research	45,000
Total	\$115,000

<b>University of Windsor</b>	\$10,000
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<b>Expenditure (other)</b>	
Western University	\$89,718
University of Windsor	5,535

<b>Balance Western University</b>	
Total income	115,000
Total expenditures	89,718
Balance	<u>25,282</u>

<b>Balance University of Windsor:</b>	
Total income	10,000
Total expenditures	5,535
Balance	<u>4,465</u>