

Coordinated Intake and Referral Pilot Project

Evaluation Review

Yates, Thorn & Associates for the City of Abbotsford

Acknowledgement:

This evaluation report on the Coordinated Intake and Referral Project was funded in part by the Government of Canada's Homelessness Partnering Strategy's Innovative Solutions to Homelessness.



Disclaimer:

The opinions and interpretations in this report are those of the author and do not necessarily reflect those of either the City of Abbotsford or the Government of Canada.

Coordinated Intake and Referral Pilot Project

External Review

Table of Contents

EXECUTIVE SUMMARY	4
BACKGROUND	6
MOVING TO A SYSTEMS APPROACH.	7
THE COORDINATED INTAKE AND REFERRAL PILOT DEVELOPMENT	11
THE EVALUATION REPORT	18
REVIEWING THE LITERATURE	20
EVALUATION QUESTIONS AND COMMENTS	26
CLEAR PURPOSE AND PRIORITIES	26
EFFECTIVE FRAMEWORK FOR TRANSFORMATIVE CHANGE	28
EFFECTIVE DELIVERY – CAPACITY, DATA AND TEAMWORK	29
EFFECTIVE COMMUNICATION AND ENGAGEMENT	32
THE PILOT AS A BASE FOR MOVING FORWARD	32
EVALUATION CONCLUSIONS	34
EVALUATION RECOMMENDATIONS	35

Executive Summary

In 2014, The City of Abbotsford, on behalf of a number of partner agencies, applied for funding and received a contribution funding agreement of \$400,989.00 from the Homelessness Partnering Strategy's (HPS) Innovative Solutions to Homelessness for the development of a Coordinated Intake and Referral Pilot Project (CIR):

- **To facilitate the multi-stakeholder creation of a coordinated intake and referral system and test it after one (1) year with the aim of demonstrating how a community-wide systems approach can be implemented and achieve results in a mid-sized Canadian city.**

As part of this project, an external evaluation was commissioned. Its role has been to look at the broader history and development of the overall homelessness response programming in Abbotsford and the role that the CIR played in that program. Its purpose is to ensure the efficacy of the work in its entirety to achieve the desirable or intended result.

Based on a review of the project's history and a review of pertinent literature, a set of evaluation questions were developed. Those questions and a summarized response to each, are as follows:

Clear Purpose and Priorities - Did the project have a clearly defined purpose and identified priorities on which it delivered?

- The need for a more coordinated intake and referral system was known very early on and was brought into focus as a very central and essential part of the homelessness system during the collaborative mapping process.
- Additionally, the process to develop the shape, purpose and priorities within the CIR were developed through parallel processes that can be described as action research in and with the community, and best practice research from the wider world.
- While it has not been able within the time and budget constraints of the contribution funding agreement to deliver on the quantitative project deliverables, the clarity of planning and initial piloting has laid the basis for the project's continuance and has ensured the model will be sustainable, given continuing resource allocations.

Effective Framework for Transformative Change - Did the approach adopted for the project provide an effective framework for the necessary degree of change?

- The pilot adopted a network governance model which research has established as being the only way to create transformative change.
- There is every indication that the collaborative roots necessary for coordinated intake and referral are now well planted.

Effective Delivery – Capacity, Data and Teamwork - Was project delivery effective?

- Those collaborative roots have enabled effective delivery. However, the project was challenged by inadequate resources, both within the project's operations, and regarding the overall homelessness system (housing and wraparound services) to which individuals are referred. It is hard to provide Housing First when there is no available housing. The same applies to a variety of health and social services.

Effective Communication and Engagement - Did the project provide clear communications and engage all the appropriate partners and stakeholders?

- Communications and engagement – to Council and boards, publics and people with lived experience – have used a variety of approaches and media. The more positive public attitude to ‘the homeless’ in Abbotsford speaks volumes about the success of the project.

The Pilot as a Base for Moving Forward – Did the pilot meet its obligations to provide a sustainable framework that could be replicated in other mid-sized Canadian cities?

- The project has communicated widely to other communities and has fully documented its processes, results and learning in an innovative and effective manner.

Additionally, the following recommendations are made:

1. That the City of Abbotsford coordinate a review of the budgetary aspects of the pilot project with a view to establishing realistic annual and five-year budgets for the continuation of the project; and that these budgets be discussed with all partner agencies with a view to gaining financial and other resource commitments from all parties.
2. That the Collaborative Roadmap for the Prevention and Management of Homelessness in Abbotsford be used as a framework for the development of a five year budget for all other aspects of the developing homeless system; and that efforts be made to fund these elements as funding programs and other resources and partners are identified.
3. That the Performance Measurement, Management and Reporting framework development continue with a view to providing as close as possible to real-time data for all agencies and parties involved in the Coordinated Intake and Referral and broader Homelessness Response Systems, and should be incorporated into the City’s digital equity strategy, and be accessible to multiple audiences.

Background

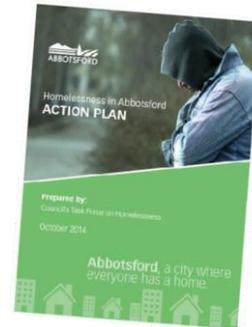
The federal government has been active in providing financial and other resources to communities for over 20 years. This started as the National Homelessness Initiative, which became Homelessness Partnering Strategy (HPS). This program has provided funding to communities in five year cycles, the latest ending in March 2019. On April 1, 2019, Reaching Home: Canada's Homelessness Strategy replaced HPS.

The community of Abbotsford has accessed funding from these program iterations for many years.

However, it was only in 2014 that agencies in Abbotsford came together in a concerted effort to address homelessness. Before then, homelessness could be characterized as a social issue that was largely hidden, with various not-for-profit agencies working to provide service to a relatively small number of people, who in turn were largely invisible to the rest of Abbotsford's residents.

Everything changed in early 2014. The number of people experiencing homelessness increased and they became more visible to the general population. In March 2014, the City responded to public and political pressure by initiating a consultation with agencies (public and not-for-profit), the public and those with lived experience of homelessness by establishing a Task Force on Homelessness. It identified five strategic directions:

1. Facilitate a Housing First approach, rather than housing only.
2. Advocate for housing and wrap-around support.
3. Initiate a Prevention Program
4. Promote a culture of awareness, inclusiveness and respect
5. Foster collaboration between agencies, community, and government.



...and proposed two initial actions to implement them, namely:

- Establish a Homeless Action Advisory Committee (HAAC), and
- Hire an experienced Housing and Homelessness Coordinator

The new coordinator recognized that changing how Abbotsford, both the City itself and its many partner agencies, responded to the challenge that increasing homelessness provided both to the community and to those individuals experiencing or at risk of homelessness, would require two fundamental shifts in focus. These were:

- Moving to a systems approach to understanding homelessness
- Adopting a more coordinated approach to the intake and referral of individuals experiencing homelessness.

Work on both these shifts began in early 2015.

These shifts in focus needed to be accompanied by revising the basic modus operandi – essentially rethinking how work is done and decisions are made. The new approach embodied the value sets learned from Community-Based Action Research, Institutional Ethnography, and Collective Impact.

- Community-Based Action Research¹ – is a partnership approach to research that equitably involves community members, organizational representatives, researchers, and others in all aspects of the research process, with all partners in the process contributing expertise and sharing in the decision-making and ownership (Wikipedia). This approach allowed participants in the system to move away from a top-down model, and for all participants to be empowered, especially people with lived experience. This ensured that the system was more truly client-centred.
- Institutional Ethnography² – this approach also refocused attention on the day-to-day experiences of the front line players, both people with lived experience and those agency workers who interacted with them on the street. When linked to the system’s map, the pathways of people through the system could be traced.
- Collective Impact was helpful in as much as it emphasized the need for the five components namely:

- A common agenda and mutually reinforcing activities – which were both provided in the collaborative roadmap
- Backbone organization and Continuous communication – which the City provided through its coordinator and the Housing Action Advisory Committee
- Shared measurement.

Five Conditions for Collective Impact



Moving to a Systems Approach.

The City sought assistance from a team of planners, with a view to constructing a collaborative planning process that dealt with homelessness as a system, and engaged key players in the process of strategy development.

The process that was used to create the strategy involved the following:

- The selection of a ‘design team’ composed of 25 individuals representing all sectors of the homelessness system.
- A series of workshops (four of 3 hours) during which the design team discussed all aspect of homelessness in Abbotsford.
 - The first workshop focused on agreeing the long-term goal that was to be achieved? This was defined as:

Fewer people become homeless and the whole community supports people who are experiencing homelessness or who become homeless.
 - Subsequent workshops reviewed draft versions of the change framework for the system: during workshops the consulting team reviewed the workshop discussion and revised the collaborative outcome map for review at the next workshop. These drafts formed both agendas for and minutes of each workshop.

The strategy that was developed through this process provided, in Theory of Change language, a Collaborative Outcome Change Framework (COCF) which took on this format:

¹ See Critical Strategies for Social Research Paperback – Sep 28 2004 - William K. Carroll (Editor) ISBN-13: 978-1551302515

² See Institutional Ethnography as Practice by [Dorothy E. Smith](#) ISBN-13: 978-0742546769

This part of the planning process was very much about identifying the outcomes and interventions/actions that were necessary and sufficient to achieve the long-term goal. Once the strategy was in its final form the implementation process began immediately. Abbotsford has made their outcome map central to their continuing work on homelessness.

The Collaborative Roadmap helped to identify the following:

- Alignment of activities and the development of the systems architecture – making sure that all actions contributed to outcomes and the long-term goal.
- Build capacity and shared learning – ensuring that all individuals and agencies knew where they were contributing and how their contributions could be enhanced through collaboration.
- Creating a sustainable foundation for the Housing First Approach to be implemented in Abbotsford.

Coordinated Intake and Referral was one functional area of the COCF. It included the following actions and outcomes:

Outcomes

- IR-1-Access is well-coordinated across all service providers
- IR-2-Intake and referral clients have their needs addressed quickly and efficiently
- IR-3-Intake and referral are managed in a seamless and integrated manner
- IR-4-A personalized care plan is developed with each person experiencing homelessness
- IR-5-Care for people experiencing homelessness is tailored to their individual needs and situation
- IR-6-An adequate supply of extreme weather beds is provided
- IR-7-An adequate supply of emergency shelter beds is provided
- IR-8-An adequate supply of transition housing units is provided
- IR-9-An adequate supply of recovery home beds is provided
- IR-10-An integrated planning approach (IPA) is established
- IR-11-An adequate quantity of shelter units/beds are available across the spectrum

Actions

- IR-A-1-Create an electronic info system (e.g., HIFIS)
- IR-A-2-Establish a single intake and assessment system
- IR-A-3-Assess the people experiencing homelessness using qualified professionals
- IR-A-4-Develop the planned supply of extreme weather beds
- IR-A-5-Develop a supply plan for emergency shelter beds
- IR-A-6-Develop a supply plan for transition housing units
- IR-A-7-Develop a supply plan for recovery home beds
- IR-A-8-Develop procedures for IPA development

The Coordinated Intake and Referral Pilot Development

As noted above, the development of a Coordinated Intake and Referral pilot project was identified firstly in the 2014 Task Force Report and again within the system strategy as a top priority for action and development.

A contribution funding agreement from the HPS Innovative Solutions to Homelessness was submitted and approved in May 2015, for \$400,989. The scope of work defined through the contribution funding agreement consisted of the following core elements and activities:

Overall Project Scope

The vision for the project was:

- To facilitate the multi-stakeholder creation of a coordinated intake and referral system and test it after one (1) year with the aim of demonstrating how a community-wide systems approach can be implemented and achieve results in a mid-sized Canadian city.

This coordinated and community-wide system would have the following characteristics and would be achieved by:

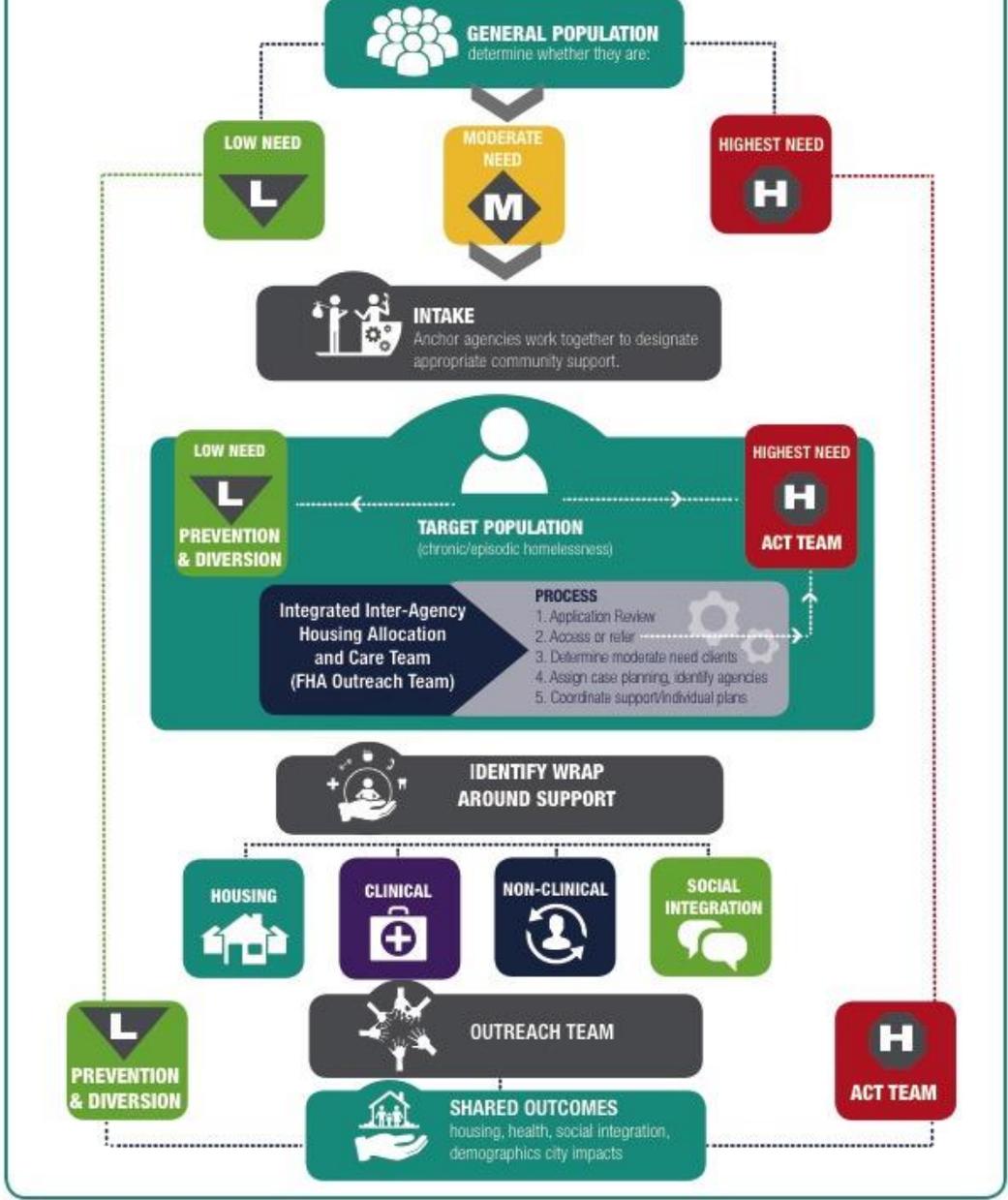
- Modeling the required systems architecture and its components
- Adopting and integrating Housing First principles into this model
- Identifying opportunities for greater systems coordination, such as leveraging shared funding, identifying key partnerships and ensuring multi-stakeholder participation and investment in the solutions.
- Emphasizing system components that strengthen collaboration between service providers, promote partnerships among key stakeholders and encouraging the alignment of activities
- Animating projects that give participants experience in collaborative research and planning, and which increase stakeholder engagement and community capacity building
- Allocate and share oversight for the completion of the project deliverables, outcomes and shared learning

Once these values and operating principles are built into the system, it was recognized that the pilot project would be both sustainable in Abbotsford and would provide a useful template for other similar sized cities

The system design process arrived eventually on the following model for the overall homelessness prevention and response system:

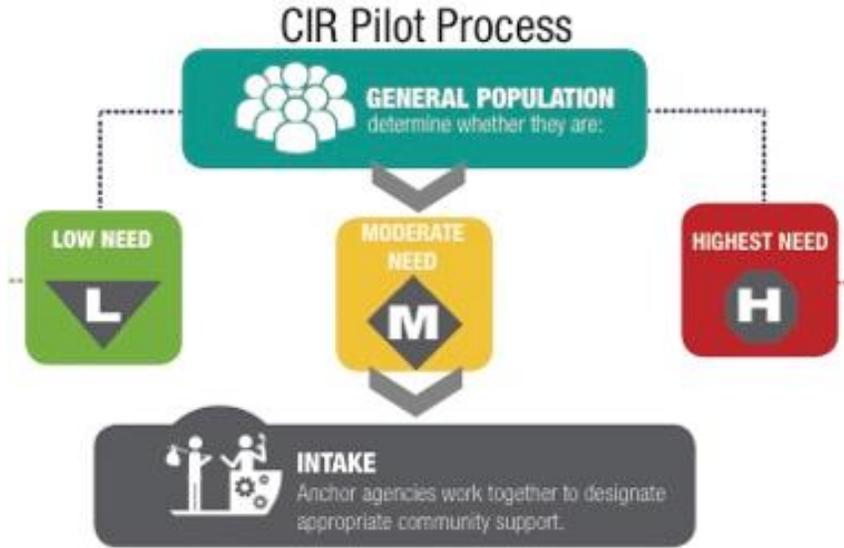
Abbotsford Homelessness Prevention and Response System

CIR Pilot Process

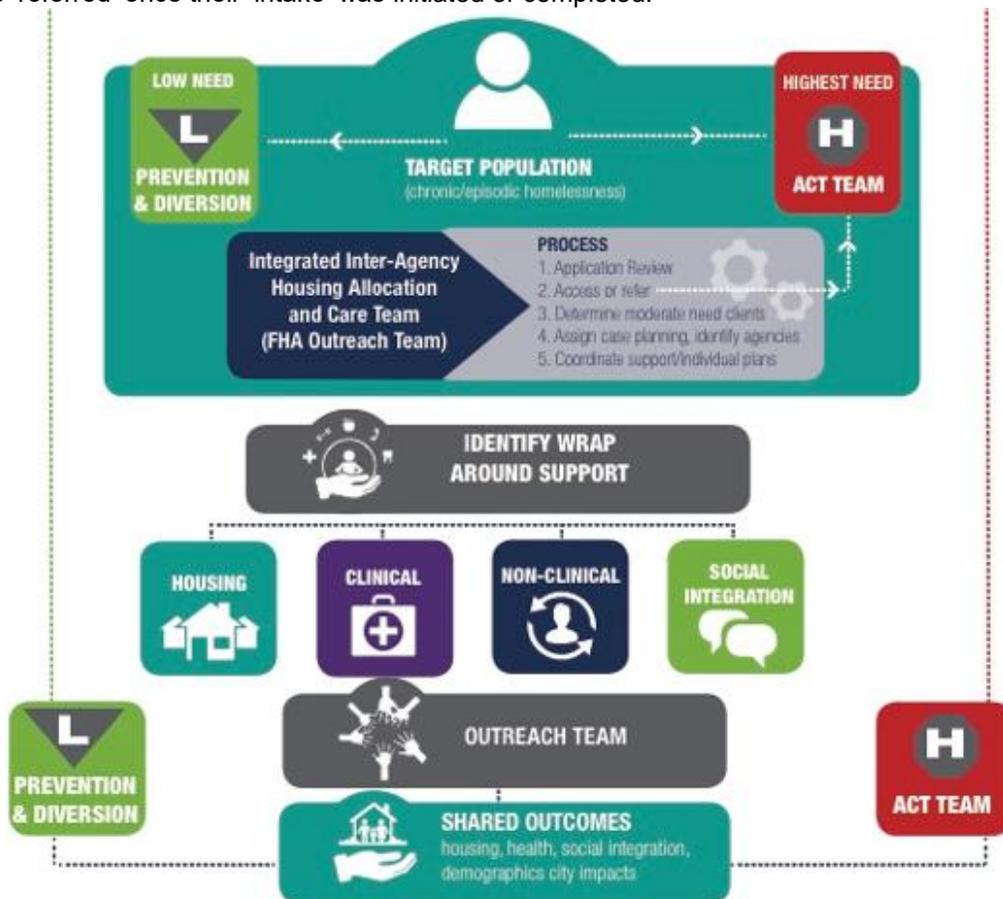


This model also consisted of two parts:

The Coordinated Intake and Referral process, which formed the top third of the model:



The response and prevention system, into which people experiencing homelessness would be 'referred' once their 'intake' was initiated or completed:



Yet in reality, none of this system existed as an integrated set of system elements – the architecture and infrastructural components all had to be created!

Key Activities

Work to create this system and to meet the requirements of the HPS contribution funding agreement was divided into three phases with key activities in each phase as follows:

To achieve this project scope, the following activities were undertaken:

Phase 1: Developing a Coordinated Intake and Referral System Model

- Homelessness Coordinator-selection and hiring
- Research Assistant- selection and hiring
- A Research Design Team was established to provide guidance to the Homelessness Coordinator and Research Coordinator
- The HAAC established an Outreach Working Group to liaise with the project and periodically report
- A Best practice review was conducted and a Regional Housing First Best Practice Forum was hosted with 175 attendees from across the region
- The needs of the Abbotsford population experiencing homelessness were inventoried
- An inventory and analysis of current intake and referral systems of agencies serving Abbotsford individuals who are experiencing homelessness was generated
- The Research Design Team, over a series of meetings, mostly monthly, reviewed the multiple journeys that archetypal homelessness people take as they move through the current system, and, with the assistance of systems mapping, could take through a revised system.

One such 'journey systems map' was created for a mythical/archetypal person experiencing homelessness – named Cameron – as follow

Phase 2: Pilot Project Testing of the Intake and Referral System Model and Establishing Sustainable Housing First Best (Promising) Practices

- Following 'pressure testing' of the model, agreement was reached regarding the Coordinated Intake and Referral Model to be tested in Phase II
- All participating agencies committed, with a MOU, to invest in and mobilize the system model
- Decision by Research Design Team, HAAC, and stakeholders to pilot the CIR for moderate to high acuity group
- The Coordinated Intake and Referral systems model was launched
- A series of training workshops were held to increase the knowledge of local agency workers. This included training re the Vulnerability Assessment Tool
- The operation of the CIR model was monitored and evaluated
- The Point In Time Count reporting was augmented to provide ongoing data for the project operation and evaluation
- The City of Abbotsford worked with Metro Vancouver to ensure an accurate inventory of the Lower Mainland homeless population, including both families, youth and Aboriginal/Indigenous populations.

Phase 3: Dissemination of Results to Abbotsford Community, throughout British Columbia, across Canada and Other Jurisdictions (e.g. North America and Europe)

- Presentations were made in numerous venues to share the learning from and results of the pilot
- A series of training modules based on learning from the pilot were developed for distribution to other communities
- A Community of Integrated Practice was launched to provide training, resources and tools to increase knowledge of and to ensure the future sustainable operation of the Coordinated Intake and Referral Model

Other funding streams and activities were developed in order to create the second part of the overall system, designed to support the referral process and provide the ongoing wraparound supports that it is recognized as being essential for people to move permanently out of homelessness.

- Additional Government of Canada Homelessness Partnering Strategy Rural and Remote funding and systems planning was accessed
- Plans for a Homelessness Hub were developed
- A Rental Connect stakeholder group was established to explore the role of private market housing in addressing homelessness, and to establish a community-wide and formal connection with landlords
- The Housing with Abbotsford Rental Connect (HARC) program was developed and initiated
- An Inter-Agency Care Team was established to promote partnerships and align existing intake and referral activities to better connect homeless populations to appropriate services, including Housing First services.
- A Performance Measurement, Management and Reporting System was developed to assist monitoring, evaluation, information sharing, and continuous improvement.

Additionally, other activities supported and sustained the project throughout its piloting stage:

- The collaborative mapping team continued to support the project
- An internal evaluation and an independent third party evaluation were commissioned and completed
- Peer Engagement ensured that individuals with lived experience of homelessness were engaged in a meaningful way to participate in all aspects of the development of the CIR model and other systems planning
- Community Forums were hosted in 2017 and 2018 (and one planned for 2019)
- HAAC continued to provide oversight to the project.

The Evaluation Report

Two evaluations have been undertaken, an internal report that conducted interviews and looked in detail at the data on the impact of the pilot on the numbers of people experiencing homelessness. This external evaluation looked at the broader history and development of the overall homelessness response programming in Abbotsford and the role that the CIR played in that program. Its purpose is to ensure the efficacy of the work in its entirety to achieve the desirable or intended result.

The first evaluation report was provided in draft in January 2019. It summarized the rationale for the pilot, reviewed the academic literature on case management, and reviewed both the history of Coordinated Intake and Referral in Abbotsford, and the detailed data provided by the PIT counts.

Additionally, the evaluators conducted a series of key informant interviews and focus groups, asking questions such as:

- What has worked well?
- What can be improved?
- What has been the impact of the CIR pilot on Abbotsford's response to homelessness?
- What outcomes were achieved?

Additionally, interviewees were asked to rate both the project's operation, and to assess the degree to which it has been a good initiative for Abbotsford.

Its conclusions can be summarized as follows:

- Everyone interviewed felt that the initiative had been successful, although it would have been more successful if more resources had been available. Additional resources were required pretty much everywhere.
- There was some concern about both the overall operation of the pilot, and with individual client intentions. There needs to be a stronger and clearer understanding of both what are 'best practices' and how these are used in interaction with clients.
- Additional role clarity, both internal to the CIR's day to day functioning, and with outside agencies, is required.
- Housing outcomes are low because there is very little available housing. The parallel initiatives like HARC, plus additional resources from the public sector (rent subsidies and affordable housing), are moving in the right direction – but much more slowly than either desired or to keep pace with increasing demand.
- The broader environment also needs more emphasis, both to increase client follow through, and to enhance community support.

Its recommendations can be summarized as follows:

- *The significance of the CIR pilot project lies in the fact that collaboration has been more formalized and has become more focused. ... The presence of CIR has buoyed front line staff. CIR/IACT represents the addition of a much needed service capacity...*
- *The CIR/IACT pilot...brought into the emerging repertoire of responses to homelessness the tremendous value of services already present in agencies who participated in the CIR/IACT pilot project*

- *CIR/IACT ...demonstrated how a coordinated system response can bring about greater efficiency and result in people being housed, treated and receiving much needed medical care*
- *CIR/IACT team has not achieved much in terms of achieving tangible outcomes, but it certainly demonstrated the benefit to be had from collaboration, coordination of interventions or operations, and has identified areas where further work is required.*
- *A key operational improvement would be to...augment qualitative evaluation with quantitative evaluation based on tracking of key performance measures.*

In summary, the evaluation recommended that:

- *The Abbotsford Homelessness Prevention and Response System is a manifestation of much needed community infrastructure that over time should be maintained and expanded. ...Building on the foundation laid by this pilot project... has the potential improve the circle of support and making it stronger, resulting in better outcomes as it relates to preventing, interrupting and reducing homelessness in Abbotsford.*

Reviewing the Literature

The internal evaluation reviewed some of the academic literature around coordinated intake and referral and case management more broadly. However, the Coordinated Intake and Referral pilot and the overall homelessness initiative in Abbotsford is testing and dependent on broader ideas and concepts, and it is essential that this external evaluation look beyond the project itself to establish its context, and through that to assess the efficacy of the work done.

In order to develop appropriate questions for this external evaluation, it will be valuable to look at three references, each of which will shine a different light on the pilot and its context.

These three are:

- Building a Collaborative Advantage: Network Governance and Homelessness Policymaking in Canada - Cary Doberstein – UBC Press 2016
- Five Phases of Collective Impact - Tamarack Institute - 2018
- Delivering For Citizens - How To Triple The Success Rate of Government Transformations - McKinsey & Co - 2019

This will provide current 'advice' from academe (Doberstein), from a social sector think-tank (Tamarack), and from the private sector (McKinsey & Co). From this, we will be able to identify a set of key evaluation questions that should be asked about the CIR Pilot Project, thus providing a broader, more external, assessment as to the pilot's effectiveness.

Building a Collaborative Advantage: Network Governance and Homelessness: Policymaking In Canada - Cary Doberstein – UBC Press 2016

Based around his research on homelessness in Vancouver, Calgary and Toronto, Doberstein believes that the structures that we create to make decisions – that is governance structures – need to change. And as our understanding of social, civil society issues increasingly focuses on their complex and interactive nature, and as our responses to them are multi-agency and multi-sector, these new governance structures must stress networking and collaboration. He notes:

But in tandem with this shift in authority in high politics, a counter-trend in public administration has emerged in certain areas – most apparent in the social policy domain – towards more inclusive and collaborative policy making and implementation, not only to bridge silos across bureaucracy but also to leverage the expertise and problem-solving potential of civil society (page 20).

And he stresses that this is often the only way in which such complex social issues can be resolved:

Designing and facilitating institutional spaces for collaborative policy making and implementation is viewed by many as an institutional solution to complex governance problems, like homelessness, that cannot be resolved by any single level of government, ministry, or sector acting alone (page 20).

He focuses in particular on the need to both find innovative solutions (which may only be 'innovative' in the sense that they had not previously been tried) and increase coordination among network partners.

This theory of network governance posits that a governance network's degree of institutionalization and inclusiveness is closely linked to policy innovation and system coordination and that the link is made principally through the brokerage relations and persuasion dynamics that are generated from network activity (page 21).

One of the core requirements in evaluating the success of these new governance models is the information that is made available to the state as funder. And local network partners are the providers of this information, which must be collected and provided to funders in ways that are consistent.

The increased complexity of social and political affairs contributed to the greater importance of information to the state in order to make effective policy, and non-state actors are critical sources of that information – from technical expertise to understanding of causal social mechanisms (page 23).

He sees the workings of network governance as requiring analysis at three distinct levels, and each level has to be 'effective' if the overall system is to function:

... Integrated governance network theory, as it relates to public policy development, requires the conceptualization of three essential features of governance networks: the mandates of the governance network, its institutional design features, and the actual practice of networking – that is the deliberative, problem solving dynamics among network actors.

... At the macro level, we must specify how network governance institutions are created, mandated, and managed from above by the state – what is generally referred to as meta-governance. Second, at the meso-level, we need to specify the structural design attributes of the governance network itself – that is how these new policy actors are positioned in the policy process. Finally, at the micro-level of individual action, we must conceptualize the behavior of individual network practices and its relationship to policy development and change – in particular, the transformative potential of the perspectives of those actors as expressed in institutionalized interactions and deliberations (page 23).

At the micro- or local level, success depends on the leadership and management styles of key personnel. The most effective style he names 'process catalyst leadership':

...process management – the management of interactions among network members – is a critical task for network managers that it is more of an interpersonal challenge than one of institutional design. Process management can range from basic tasks like recruiting membership and chairing meetings to more complex tasks like balancing and coordinating interests at a strategic level.

... Stress that an effective leadership style, a style that they call "process catalyst leadership", is one "that is able to make connections, to bridge diverse cultures, and that can get participants to be comfortable sharing ideas, resources, and power (page 28).

It is not just leadership style that is important; the effectiveness of the network will be only as good as the people who make up the network. They must represent the diverse universe of the challenge at hand, and they must be people with 'agency' – the capability to make things happen:

Governance networks are institutional structures, but perhaps more importantly, they are made up of actors with agency. In fact this is where the promise of governance networks resides – in the diversity of actors who come together to deliberate and problem solve (page 32).

These 'people with agency' are of course much better than 'hard data' – they know what's going on before the data is even collected:

A former BC Housing manager explained it this way:

it's way too easy as a government bureaucrat to sit in our office and look at stats and think you know that what's happening on the street is because of this or that. And in part, that is because your statistics will only tell you what you measure, whereas service providers are in it day-to-day, and they will recognize trends that are happening before the statistics can identify them (page 83).

The net goal of this approach, which Doberstein uses as the title of his book, is 'collaborative advantage' – the innovation and enhanced effectiveness that flows from true collaboration:

There is broad agreement that some form of network governance or collaborative governance is vital to address urban homelessness effectively, in part because it leads to achievements that would not be possible in a siloed organizational context. In essence, network governance has the potential to produce a collaborative advantage (page 162).

Five Phases Of Collective Impact - Tamarack institute – 2019

The concept of collective impact has been promoted and used in numerous communities to bring together agencies, primarily in the social policy space, to collaborate on complex challenges. In a recent [posting](#), they note:

The power of Collective Impact lies in the heightened vigilance that comes from multiple organizations looking for resources and innovations through the same lens, the rapid learning that comes from continuous feedback loops, and the immediacy of action that comes from a unified and simultaneous response among all participants.

They identify five phases to the development of collective impact, noting:

It is a useful framework for describing the development of a Collective Impact initiative.

They diagram these five phases as follows:

The 5 Phases of Collective Impact

Components for Success	Phase I Assess Readiness	Phase II Initiate Action	Phase III Organize for Impact	Phase IV Begin Implementation	Phase V Sustain Action and Impact
Governance & Infrastructure	Convene Community Leaders	Identify champions and form cross-sector Steering Committee (SC) to guide the effort	Determine initial workgroups and plan backbone organization	Launch work groups (WGs) and select backbone organization	Build out the backbone organization, evolve WGs to meet emergent strategy
Strategic Planning	Hold dialogue about issue, community context, and available resources	Map the landscape and use data to make case	Create common agenda, clear problem definition, population level goal	Develop blueprint for implementation and identify quick wins	Refine strategies and mobilize for quick wins
Community Engagement	Determine community readiness; Create a community engagement plan	Begin outreach to community leaders	Incorporate community voice, gain community perspective and input around issue	Engage community more broadly and build public will	Continue engagement and conduct advocacy
Evaluation and Improvement	Determine if there is consensus/urgency to move forward	Analyze baseline data to ID key issues and gaps	Develop high level shared metrics and/or strategies at SC level	Establish shared measures (indicators and approach) at SC and WG levels	Collect, track, and report process (process to learn and improve)

Based on this description of what activities are (or are not) happening in a collective impact initiative, it is possible to assess how successful that initiative has been at achieving the full end-state of collective impact.

McKinsey & Co are at the cutting edge of management consulting, being advisors to an enormous range of government and private sector clients. They frequently step-back and evaluate the 'meta learning' that comes from their consulting work. One such research endeavor focused on transformative change in governmental/public sector agencies. In reporting on this work, they noted:

...our research has revealed that only 20 percent of large-scale government change efforts fully succeed in meeting their objectives. There is no shortage of bold government visions; the challenge is how to translate those visions into reality.

They summarized their learning about the five essential values or change-drivers for effective action under five headings, with associated 'checklists for success', as follows:

Committed leadership: Why ordinary management is not enough

- *Don't launch a transformation effort if you are not able to use significant political and personal capital to make it successful.*
- *Don't rule out radical action if it is necessary, such as changing legislation, setting up new institutions, or removing transformation blockers.*
- *Show sustained commitment by spending a significant amount of time visibly leading and role-modeling the change.*

Clear purpose and priorities: Why "less is more" in government transformations

- *Don't assume you know what citizens or public servants want and need—find out what really matters to them in their day-to-day lives.*
- *Explicitly choose and commit to a small number of specific outcomes that you are going to focus on in the transformation—and avoid making your goals too broad.*
- *Anchor the transformation in an agreed baseline, trajectory, and target outcomes.*

Cadence and coordination in delivery: Why standard public-sector processes will not build momentum

- *Avoid planning paralysis: make planning participative and time bound and move to action quickly, in the knowledge that plans will be adapted once implementation starts.*
- *Link planning and budgeting processes to ensure alignment, demonstrate commitment, and avoid unnecessary delays when ramping up the transformation.*
- *Appoint a dedicated transformation team to set the pace, solve problems when they arise, coordinate between agencies, track performance, and hold people accountable.*
- *Deliver quick wins and fast-track decisions to build momentum, while maintaining commitment and focus until the transformation is self-sustaining.*

Compelling communication: Why lip service will never mobilize people

- *Don't try to please everyone—while staff and citizens are core to success, attempting to address all interested parties can dilute and distract.*
- *Inspire through a compelling change story, with the "why," "where," "what," and "how"— and "what is in it for each individual."*
- *Overinvest in frequent face-to-face, frontline communication, and listen as much as you talk.*
- *Communicate targets publicly to create accountability and communicate progress to celebrate success.*

Capability for change: Why business-as-usual skills won't deliver

- *Take training well beyond the top team—new capabilities are typically needed at all levels of the organization to deliver and sustain change.*
- *Make sure delivery and technical experts are fully involved from the start: new capabilities mean little if the experts are not listened to.*
- *Invest real resources in training for specific capability gaps, which are often in change management, operational, and technical skills.*
- *Realign recognition systems to align with the transformation goals and remove blockers who might derail or slow down the transformation.*

So we have 'advice' from academe (Doberstein), from a social sector think-tank (Tamarack), and from the private sector (McKinsey & Co). From this, we have identified a set of key evaluation questions that should be asked about the CIR Pilot Project, to get some idea as to its effectiveness.

Evaluation Questions and Comments

Our review of the efficacy of the project and its broader context prompts us to pose a number of questions:

- **Clear Purpose and Priorities** - Did the project have a clearly defined purpose and identified priorities on which it delivered?
- **Effective Framework for Transformative Change** - Did the approach adopted for the project provide an effective framework for the necessary degree of change?
- **Effective Delivery – Capacity, Data and Teamwork** - Was project delivery effective?
- **Effective Communication and Engagement** - Did the project provide clear communications and engage all the appropriate partners and stakeholders?
- **The Pilot as a Base for Moving Forward** – Did the pilot meet its obligations to provide a sustainable framework that could be replicated in other mid-sized Canadian cities?

Clear Purpose and Priorities

<p>How well did the CIR pilot reflect the system outcomes as defined in the system Collaborative Outcome Map?</p> <p>Did the pilot change attitudes and build trust?</p> <p>How well did the pilot as rolled out reflect the hopes and aspirations of its original designers?</p>	<p>It was recognized early on in the overall process of planning to address homelessness in Abbotsford that, coordinated intake and referral was important. This was recognized by the first Task Force analysis and reporting in 2014. Once recognized, the general parameters for this CIR Pilot Project were established and an application for funding through the HPS Innovative Solutions to Homelessness stream was made.</p> <p>It was also recognized that the CIR project would only be successfully developed if other supportive system elements were created. As was noted by one observer, “there was no system to refer people into”. Consequently, as the project unfolded, it was also recognized that it would be necessary to devote time, energy and resources to the creation of other aspects of the system development.</p> <p>The first step in this process was the development of the Collaborative Roadmap for the Prevention of and Response to Homelessness in Abbotsford. This fulfilled a number of key tasks:</p> <ul style="list-style-type: none"> • It described the complete homelessness system • It was outcome focused – It laid out the necessary outcomes and actions for the complete system • It identified where agencies were active within the system – who was doing what, and where no action was occurring • It identified the priority actions and outcomes. <p>At this stage therefore, the CIR project was both identified as the top priority and the other necessary</p>
---	--

	<p>components of the system were also identified. Work could start on developing this ‘total system’ approach.</p> <p>It was also recognized through this process that traditional project delivery approaches would not deliver transformative change – a top-down model had been tried in the past, and all agents, both the not-for-profit agencies and those people experiencing homelessness, were very distrustful of ‘the system’. An approach which Doberstein would characterize as ‘network governance’ was required.</p> <p>This approach would also build on the principles of Collective Impact and Community-based Research. These required the meaningful involvement of all agents and agencies in all aspects of the project. It is beyond the mandate of this report to describe the system of inter-locking teams that have been set up to search for collective impacts/solutions and to research the various aspects of the project, but they are numerous. Organizing these interlocking elements also required:</p> <ul style="list-style-type: none">• Strong and appropriate leadership – Doberstein’s ‘process catalyst leadership’• Involvement from those people at the ‘coal face’ – what he terms ‘people with agency’. <p>Overcoming distrust was an essential first step in establishing relationships with many groups. For instance, those working for not-for-profit agencies in direct work with people experiencing homelessness were distrustful of ‘more money for research’, and not keen on spending time in ‘more meetings to tell funders what we already know’. And the public were skeptical since there are still ‘people on the street’. In this latter regard, the adoption of a ‘functional definition of homelessness’ was helpful in showing people that there will always be homeless people with us, and that the initiative was taking a different, more caring approach. This also made it easier for everyone to shift to a Housing First focus – yes, it is about housing, but shelters will always be needed.</p> <p>Slowly, attitudes changed. Those in positions of power recognized the importance of the project and its more human-rights approach. Agencies became more collaborative and engaged. People experiencing homelessness started to see positive changes happen to them or their friends.</p>
--	---

Effective Framework for Transformative Change

<p>Did the organizational framework selected for the pilot match the needs for transformative change?</p> <p>How committed were the leadership of the pilot to the achievement of its success?</p> <p>Was adequate time and resources dedicated to the planning and roll out of the pilot?</p> <p>How were inevitable ambiguities in roles and language addressed?</p>	<p>As noted above, these changes required different approaches – more collaborative, more networked, more client centred; and the organizational framework selected did reflect this need. Having City Council in the role of ‘backbone organization’, committing its own funds and in-kind resources to the project, clearly indicated its support in general terms. And the ‘hands-on’ approach and role taken by HAAC provided what in other communities would be the role of Community Advisory Board. HAAC also championed the ‘network governance’ approach that Doberstein notes as critical to transformative change.</p> <p>This did challenge those in the system with attitudes and experiences that were more established and hierarchical. But the injection of funding from the Government of Canada emphasized that the initiative is not solely owned by the City of Abbotsford, BC Housing or any one agency, but is collaboratively owned.</p> <p>This was noted often in the Collaborative Roadmap planning workshops when the City representative said, in response to a specific suggested action, “the City can’t do that” ...with the response from others “this isn’t a City strategy, it’s a community strategy”.</p> <p>By and large, over time, most parties bought into this approach and found that it did provide the basis for transformative change. There were some surprises and some hold-outs:</p> <ul style="list-style-type: none"> • City Council has never wavered in its support. This might be in part because their initial strategy likely showed them that even people experiencing homelessness have ‘human rights’, but is also because they have noted the change in attitudes among their electors, and have received kudos and recognition for their approach. • City and other senior managers have been somewhat slower to come onside. Continual capacity building toward a change in corporate culture has been a constant requirement. • Fraser Health have been key partners – this is likely due to their public and population health approaches/values and the recognition that these new approaches, and the transformative change they bring, will be a more cost effective way of
--	--

	<p>addressing the health challenges of people experiencing homelessness.</p> <ul style="list-style-type: none"> • BC Housing has been supportive at the local level, but in word rather than in deed. However, they are coming to recognize that the housing initiatives such as HARC, while not within their direct mandate, can assist them to achieve their housing delivery goals. <p>However, the ‘network governance’ approach has delivered on effective system transformation and the achievement of numerous identified CIR deliverables.</p> <p>The question of adequate time for planning provided a conundrum from the start. Once funding was approved, many agencies wanted less talk and more action. However, the coordinator recognized the need for broader consultation and ensured that adequate time and resources were committed to up-front planning. This delayed slightly project start-up, but it did lay down for the pilot to be truly sustainable in the long term.</p> <p>Part of the project learning has been around language, and this has been a continual discussion point in relation to data collection. However, staff have been aware of the many nuances of language and have addressed them in an ongoing manner. One example of note is the simple question ‘when does engagement with a person experiencing homelessness become a ‘referral’ to the pilot?’</p>
--	---

Effective Delivery – Capacity, Data and Teamwork

<p>Were adequate resources and capacity provided for project success?</p> <p>Were project team members ‘actors with agency’?</p> <p>How well did the project team members work together?</p> <p>Was information and data between agencies shared willingly?</p> <p>To what extent was the pilot dependent on outside data systems?</p>	<p>The funding from HPS Innovative Solutions to Homelessness funding stream was not, of itself, sufficient to complete the pilot project. But then it was not meant to be the only resources committed. The terms of the contribution funding agreement were such that other parties, especially the City of Abbotsford, would commit funds and other agencies, such as Fraser Health, would provide service through both existing services, and new services as required.</p> <p>In particular, the City’s contribution of staff time and resources was essential to both the creation of the overall vision and its system elements, as well as the provider of leadership and ‘soft power’ as required to keep the project moving rapidly forward. And additional funding was also provided through the Prince George Nechako Aboriginal Employment</p>
--	--

	<p>Association, BC (PGNAETA-BC) which is the agency that managed the HPS Rural and Remote funding program.</p> <p>The research design team that came together to deliver on CIR project goals has been effective in its tasks. For the City, the CIR pilot project has been central to their other homelessness and housing related tasks. And the situation of their office within the office of the Deputy City Manager enabled the deflection of activities that might otherwise have diverted energy or caused deviation from the key task at hand.</p> <p>Additionally, the establishment of a full-time Intake Coordinator position, and the appointment to that position of a 'person with agency' was also critical. She knew all the players, had their trust, and was able to smooth the wrinkles as or before they appeared.</p> <p>Prior to the creation of the CIR project, City Council had established the Homelessness Action Advisory Committee. This was an official City Committee, and therefore was resourced and operated as a key link to Council. This provided additional legitimacy and provided those invaluable resources of meeting minutes, agendas, etc. that would otherwise have fallen on and detracted from the work of pilot project staff.</p> <p>Its operation was also managed to be part of the network governance approach, in as much as its formal members were key agency staff, but its monthly invitation and attendance was to and from a wide range of system players.</p> <p>The issue of inadequate resources was noted frequently in responses to the evaluation survey. Most of these comments focused on the lack of specialist health and counseling staff and the lack of housing for the delivery of Housing First. Efforts were made, on a continuous basis by Fraser Health Authority to address the former challenge, and the establishment of the Rental Connect (HARC) program did go some way toward the securing of much needed rental housing (with funding from PGNATEA-BC). Additionally, BC Housing did provide some additional rent subsidies and modular housing units. But the bottom line is likely that, in the short to medium term, there will never be enough housing or health services.</p> <p>This however, begs the question of whether there are better ways to allocate funding to meet the</p>
--	--

needs of people experiencing homelessness. In this regard, the creation of the Abbotsford Community Hub Centre, providing a range of support services in one location, was firstly a key priority identified in the system mapping, and is now fully operational. Hopefully time will show that this kind of upstream intervention is a more productive use of funds than emergency care.

Data and data frameworks have been a challenge throughout the pilot. Before its instigation, all agencies kept their own information on those people experiencing homelessness in their care. Selecting or creating a system which all agencies could use to keep a standardized record of the people experiencing homelessness moving through the system was an early and high priority. Initially, it was hoped and assumed that HIFIS 4.0, managed in BC by BC Housing, would provide the system. However, its timelines looked, and continue to be, problematic. Following that, a variety of other systems were reviewed as an interim solution – but none proved satisfactory. In the end, an Excel spreadsheet was created and used, providing adequate data for reporting purposes, but proving a challenge for both data input and analysis. Hopefully HIFIS 4.0 will solve this problem whenever it becomes available.

However, data also needs to be seen as a broader concept, in particular providing information against which the success of the whole system can be measured. Current work is underway in Abbotsford to put in place two such systems:

- A Performance Measurement, Management and Reporting system (PM2R) has been developed using the Collaborative Roadmap as a framework. The core focus of this work was to develop ‘dashboards’ that could be populated with specific data, correlations, and outcomes that would inform policy making decisions, community business cases, and shared/leveraged funding opportunities. This would in turn advance collaborative investment in socio-economic innovation, respond to issues of vulnerability in the Abbotsford community, reduce costs to all community systems, and provide the opportunity to re-invest savings into the local economy and the health and well-being of Abbotsford residents. This project is in stage 3 of its development.
- A joint project with Division of Family Practice, Abbotsford 211, Abbotsford Community Foundation/Vital Signs, and HelpSeeker is underway.

Effective Communication and Engagement

<p>Were the channels of communication to project sponsors open, collaborative and enabling of success?</p> <p>Were clients – people experiencing homelessness – generally supportive and feeling better served by the approach adopted by the pilot?</p> <p>Did the pilot create a compelling story or narrative that can tell the story to others?</p>	<p>A multi-pronged approach has been developed to ensure both community engagement and communication among various elements of the system:</p> <ul style="list-style-type: none"> • Communication with City Council and the boards of major agencies is achieved through the City HAAC committee. • Engagement and communication with stakeholders has been achieved through attendance at and organizing of multiple events. For instance, Community Forums have been hosted in 2016, 2017, 2018 and another will be held in June 2019. • Engagement with the public has been achieved through the development of the Stories Project which has developed a set of videos which tell the story of both the initiative and of some of the people experiencing homelessness. These are accessible from the City website, which also provides a range of information on the homelessness challenge and response to it. • There has also been engagement with people experiencing homelessness, and the evaluation report notes a number of instances where specific people have noted positive changes in how they are treated and responded to. <p>The Collaborative Roadmap has also provided a way of communicating with people and explaining to them and identifying where they can be involved in support of the system.</p>
---	--

The Pilot as a Base for Moving Forward

<p>Was the learning of the pilot captured so that its knowledge can be translated to and used in other mid-sized Canadian cities?</p> <p>Is the efficacy of the pilot sufficient to convert it into a permanent process, with or without amendments?</p>	<p>Project knowledge and learning has been transmitted to other communities in a variety of ways:</p> <ul style="list-style-type: none"> • Direct presentations in neighbouring communities: Victoria, Ottawa, Surrey, Metro Vancouver and various Fraser Valley communities. • The development of an online curriculum by University of the Fraser Valley, with numerous associated learning materials.
--	--

	<p>This is offered both as online non-certificated learning and certificated for registered students</p> <ul style="list-style-type: none"> • The development of a Community of Integrated Practice, which brings together many different cross-sectoral groups. Its purpose is to increase awareness, understanding and capacity across all domains as well as across communities, geographies, etc.; it is also open to communities across North America, for example, as knowledge exchange partners. One project of the Abbotsford group is the development of Standards of Practice. • This group is also augmented by a range of specialist 'learning circles', which are bringing together workers and volunteers related to topics such as hospital discharge into homelessness, community justice and public safety. These are all cross-agency and cross-sector groups: for instance, the community justice and public safety group includes representatives of City Bylaws, prison authority, courts/justice. It is planned that this will develop into a proposal for a Community Court. <p>The key to all these initiatives is the commitment to look holistically and work collaboratively to determine solutions that work for everyone.</p> <p>The pilot is certainly successful and would be scalable to both larger and smaller communities. It has put in place most of the building blocks for another city or jurisdiction to use as a start to building their own CIR/comprehensive homelessness initiative.</p>
--	--

Clearly exceptional work has been done and the people of Abbotsford and region can be justly proud. On the evening of March 14, 2019, 300+ people attended the Fraser Valley Cultural Diversity Award ceremony. Out of 14 submissions in its category, the Abbotsford Homelessness Community Hub Centre was the selected winner.

Several councilors were in attendance. Cllr. Dave Loewen tweeted:



Dave Loewen (@DaveFLoewen)

3/14/19, 10:11 PM

So gratifying to receive this recognition after all the hard work by staff and city partners over the last 4 years! [@City_Abbotsford](#) [@BC_Housing](#) [@Fraserhealth](#) [#affordablehousing](#) [#Homelessness](#) [@PatriciaDRoss](#) [@SandyBlue55](#) [@MayorHenryBraun](#) [twitter.com/abbcommservs/s...](#)

Evaluation Conclusions

Based on a clear understanding of how the CIR Pilot Project was conceptualized, planned and rolled out, together with reference to some pertinent literature sources, a set of evaluation questions were identified. The conclusions that can be drawn concerning the project, from each of these questions, are as follows:

<p>Clear Purpose and Priorities - Did the project have a clearly defined purpose and identified priorities on which it delivered?</p>	<p>The need for a more coordinated intake and referral system was known very early on and was brought into focus as a very central and essential part of the homelessness system during the collaborative mapping process.</p> <p>Additionally, the process to develop the shape, purpose and priorities within the CIR were developed through parallel processes that can be described as action research in and with the community, and best practice research from the wider world.</p> <p>While it has not been able within the time and budget constraints of the contribution funding agreement to deliver on the quantitative project deliverables, the clarity of planning and initial piloting has laid the basis for the project's continuance and has ensured the model will be sustainable, given continuing resource allocations.</p>
<p>Effective Framework for Transformative Change - Did the approach adopted for the project provide an effective framework for the necessary degree of change?</p>	<p>The pilot adopted a network governance model which research has established as being the only way to create transformative change.</p> <p>There is every indication that the collaborative roots necessary for coordinated intake and referral are now well planted.</p>
<p>Effective Delivery – Capacity, Data and Teamwork - Was project delivery effective?</p>	<p>Those collaborative roots have enabled effective delivery. However, the project was challenged by inadequate resources, both within the project's operations, and regarding the overall homelessness system (housing and wraparound services) to which individuals are referred. It is hard to provide <i>Housing First</i> when there is no available housing. The same applies to a variety of health and social services.</p>
<p>Effective Communication and Engagement - Did the project provide clear communications and engage all the appropriate partners and stakeholders?</p>	<p>Communications and engagement – to Council and boards, publics and people with lived experience – have used a variety of approaches and media. The more positive public attitude to 'the homeless' in Abbotsford speaks volumes about the success of the project.</p>
<p>The Pilot as a Base for Moving Forward – Did the pilot meet its obligations to provide a sustainable framework that could be replicated in other mid-sized Canadian cities?</p>	<p>The project has communicated widely to other communities and has fully documented its processes, results and learning in an innovative and effective manner.</p>

Evaluation Recommendations

The following recommendations are made:

1. That the City of Abbotsford coordinate a review of the budgetary aspects of the pilot project with a view to establishing realistic annual and five-year budgets for the continuation of the project; and that these budgets be discussed with all partner agencies with a view to gaining financial and other resource commitments from all parties.
2. That the Collaborative Roadmap for the Prevention and Management of Homelessness in Abbotsford be used as a framework for the development of a five-year budget for all other aspects of the developing homeless system; and that efforts be made to fund these elements as funding programs and other resources and partners are identified.
3. That the Performance Measurement, Management and Reporting framework development continue with a view to providing as close as possible to real-time data for all agencies and parties involved in the Coordinated Intake and Referral and broader Homelessness Response Systems, and should be incorporated into the City's digital equity strategy, and be accessible to multiple audiences.