Governance:
A Key Function in Coordinated Access

Webinar: October 4, 2019

Wally Czech – Director of Training

CAEH Training & Technical Assistance

Ending Homelessness in Canada

The Canadian Alliance to End Homelessness

The CAEH leads a national movement of individuals, organizations and communities working together to end homelessness in Canada.

caeh.ca

National Conference on Ending Homelessness

Join us in Edmonton for the 2019 National Conference on Ending Homelessness.

conference.caeh.ca

Built for Zero Canada

An ambitious national change effort helping a core group of leading communities end chronic homelessness - a first step on the path to eliminating all homelessness in Canada.

bfzcanada.ca

Training & Technical Assistance

Helping communities and organizations end homelessness with expert training and technical assistance.

training.caeh.ca

Allied Networks

The CAEH supports several allied networks working toward our shared mission of ending homelessness.

caeh.ca

Our Mission

Helping communities and organizations end homelessness with expert training and technical assistance.

The CAEH BNL/CA TTA is funded in part by the Government of Canada through the Community Capacity and Innovation funding stream of Reaching Home: Canada's Homelessness Strategy.

Meet the Presenter

Wally Czech
Director of Training
CAEH

CAEH

Todays Content

AGENDA

	Governance in Coordinated Access
1	Welcome from CAEH
2	Defining Governance
3	Primary roles and functions of management/governing body
4	Governance Models (Pros and Cons)
5	Policies for CA
6	Leadership Staffing in Governance
7	Resources

Reaching Home Minimum Requirement

RH Mandatory Requirement:
"Communities are required to build an appropriate governance operating model to exercise proper leadership for the planning, implementation and ongoing management of the coordinated access system."

➤ Basic Policies

More Advanced Aspects: Discussed Later

CA Scorecard for Governance

CA Scorecard 2.0 Questions

Part 1: CA Management

1. Governance

CA Scorecard 2.0 Questions:

1.1 Has your community identified a governance model and lead organization for implementation and ongoing management and operation of your CA? (RH, Basic)

- ☐ Lead organization identified (RH, Basic)
- ☐ Governance model identified (RH, Basic)
- ☐ Governance model is documented (Basic)
- ☐ Governance model is operating (Basic)
- ☐ Governance model allows for timely decisions on CA matters (Basic)

RH:	0
Basic:	0

What is Governance?

Cambridge Dictionary
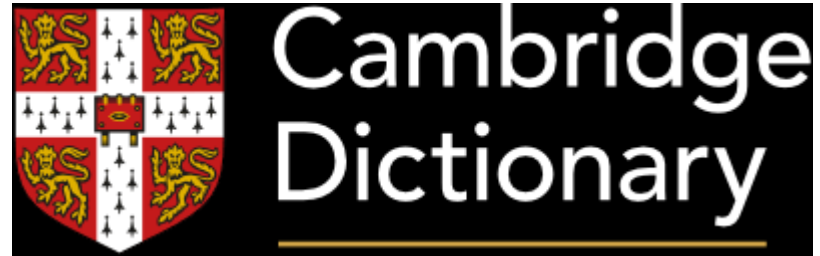
"The way in which an organization is managed at the highest level, and the systems for doing this."

The way in which a CA system is managed at the highest level through evidenced-based best practices and community determined appropriate staffing, structure, processes and collaboration with the organizations within it.

Housing First Philosophy

"**There has to be a system leader.** This management body is ideally a dedicated team positioned and approved by system participants to provide oversight, guidance, monitoring and evaluation and the development of the CAS policies and procedures. They would ensure best practices within the system, and most of all, they work to keep the CAS consistent and in fidelity to the Housing First approach and the established community process. All of this would be done by incorporating feedback from community including persons with lived experience."

"What is a Coordinated Access System?"

BLOG

Other Stakeholders
Service Providers
Indigenous Representation

Community Involvement

Roles and Responsibilities

- Develop and implement CA system

- Allocate and manage funding

- Engagement and championing

- Training and best practices

- Data collection and interpretation

- Monitoring plan outcomes

CA Scorecard Focuses for System Development

2. Key Approaches

Questions in CA Scorecard 2.0

2.1 Is your CA system guided by the following key principles and approaches? (Advanced)

- ☐ Peer and lived experience voice/leadership
- ☐ Housing First philosophy
- ☐ Strengths-based approaches
- ☐ Equity lens
- ☐ Truth and Reconciliation Calls to Action and MMIWG Calls to Justice
- ☐ Youth-specific considerations
- ☐ Rights-based approaches
- ☐ Systems Integration (beyond just housing and homeless system)

Advanced:	0

Additional Details: Key Approaches

Advanced

The key approaches identified here are areas for consideration and continuous improvement. They can be addressed in many ways, to different degrees, large and small. Your community decides when it makes sense to check off that sufficient work has occurred in a particular area – documenting current status and next steps in the CA Scorecard.

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System Structure

- Lead/Backbone organization
- CA policies/procedures/standards
- Processes for monitoring and reporting system performance and outcomes
- Community priorities
- System for Access, prioritization, matching, and referral
- Process for data collection and tracking
- Process for feedback to and from system and community
- Coordination of system components
- Training plans and regimen

Roles and Responsibilities

Development
Plan Implementation

Community Entity

- Clear and transparent processes
  - Receiving, allocation, reporting
- Calls for application
- Changes in priorities and use
  - Service provider input
  - Driven by outcomes and identified need
- Does funding role get in the way of system planning?
  - Should they be separated?

Roles and Responsibilities

- Locally, provincially, nationally
- Trust building
  - Transparent processes that lead to effective decision making
  - Mediation within the system
- Development of partnerships
  - Formal linkages
- Education and Training
- Advocating
  - Funders
  - Government
  - External systems (Child Welfare, Education, Healthcare, Justice)
- Indigenous leadership and partnerships are prioritized

Roles and Responsibilities

Engagement
Community Champions

- Support for CA Staff and CAB
- Support for service providers
- Training regimen
- Ensure monitoring
- Budget considerations
- Key Topics
  - Housing First, HIFIS/HMIS, BNL/CA, TIC, Recovery Orientation, Housing Procurement, ACT and ICM, Assessment/Tools, System Leadership, etc

Roles and Responsibilities

Training
Best Practices

- Who is managing the BNL and HMIS
  - Matching and refferal
- How is information being fed to them?
- Proper resources to manage on ongoing basis
- Can manage in real time fashion
- Can produce ongoing interpretation and results in real time.
- Can support system in understanding the meaning behind the data
- Can provide expertise to monitor performance of homeless serving system in real time to improve outcomes

Roles and Responsibilities

Data
Collection/Interpretation

- Who analyzes aggregate data, determines if targets are being met?
- BNL/ In-flow and out-flow
- Reductions in homelessness
- Returns to system
- Housing stock,
- Community changes
- Consistency with best practices
- Fidelity to community driven CA process
    - Access points
    - Assessment process
    - Matching and referrals

Roles and Responsibilities

Monitoring
CA and Outcomes

Governance Models

"Each community will have to assess based on their existing resources, relationships, community engagement process, and level of trust within the sector, which model makes the most sense. "

- CE as a Standalone Organization
- CE as a Branch of Existing Organization
- Municipality as CE

SYSTEMSPLANNING
COLLECTIVE

CAB

CE

Executive Director
CE Staff

Community Agencies
Head of CE/CE Rep
People with LE

Community Entity as Standalone Organization

CE as Standalone

Pro's

- Shows organizations commitment and involvement

- Ensures continued championing

- Staff Recruitment advantages

- "Fresh Start" may carry more capital in community to move things ahead

- Opportunity for greater Indigenous leadership

- Harnesses community appetite for change

- Better-poised to push policy/systems changes

Con's

- Creates new, outside pressures on the organization for action

- Community concern about another non-profit

- Takes funds away from direct services

- May have a direction not supported by organization on key issues

- Requires more substantial resources to operate and maintain.

Manager
CE Staff

Community Agencies
CE Rep (Manager)
People with LE
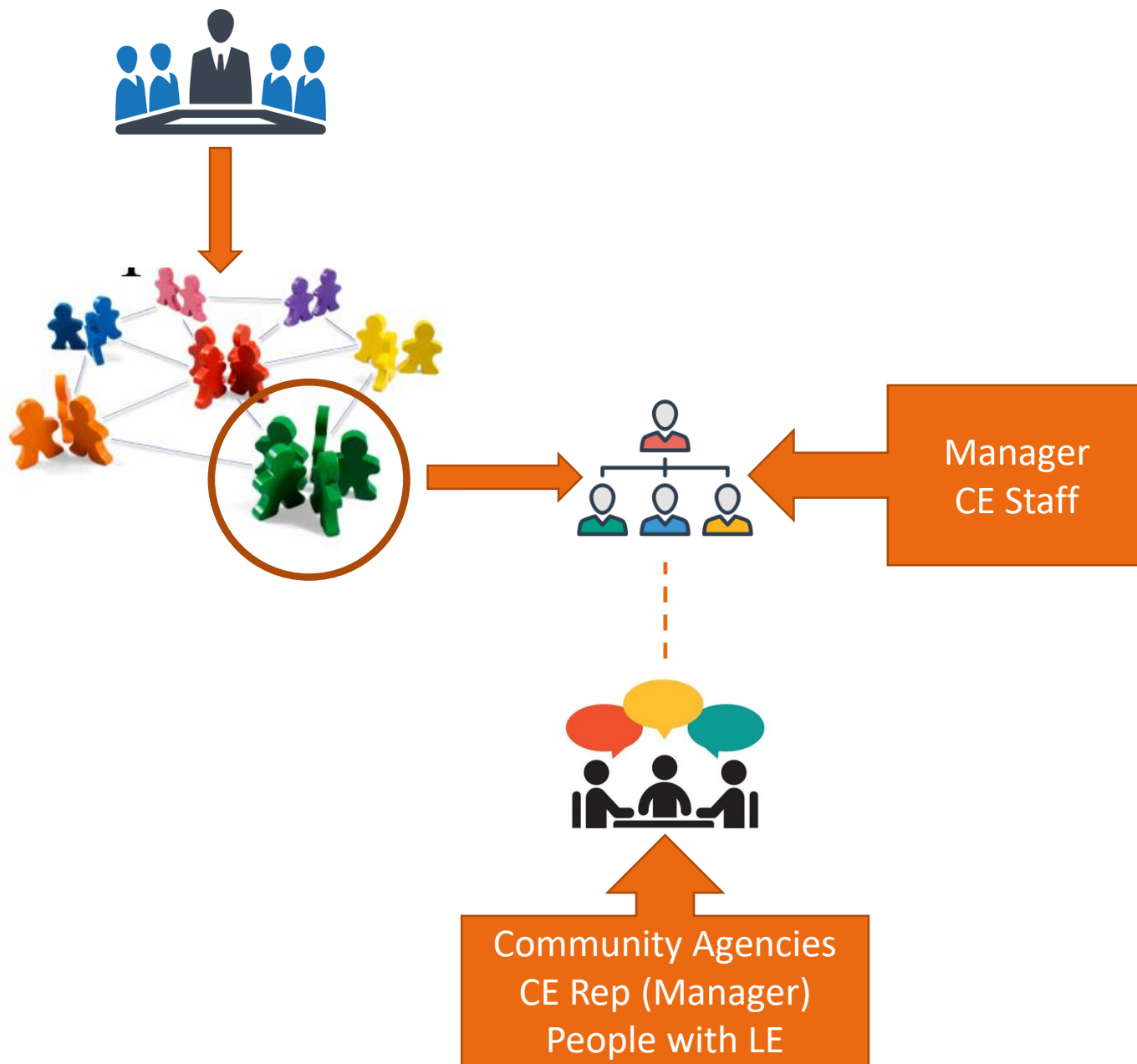
**Community Entity as Branch of Existing Organization**

CE as Branch of Existing Org.

Pro's

- Can ensure continued championing

- At arms-length from the organization (decreased liability/risk-management)

- Relatively low-cost option to maintain

- Strong optics of being community-based

- Likely closer to Lived Experience expertise and ability to engage and hire LE

- Administrative infrastructure already exists (HR, Payroll, office space, etc)

Con's

- Higher likelihood of no Indigenous leadership

- Contracting with any one agency may be viewed as favoritism

- Community org may have less experience navigating policy change and systems work required in the Strategy to End Homelessness

- Systems Planning Expertise may not exist within service provider manager

- Board of Directors of agency, which may have different mandate than Strategy to End Homelessness
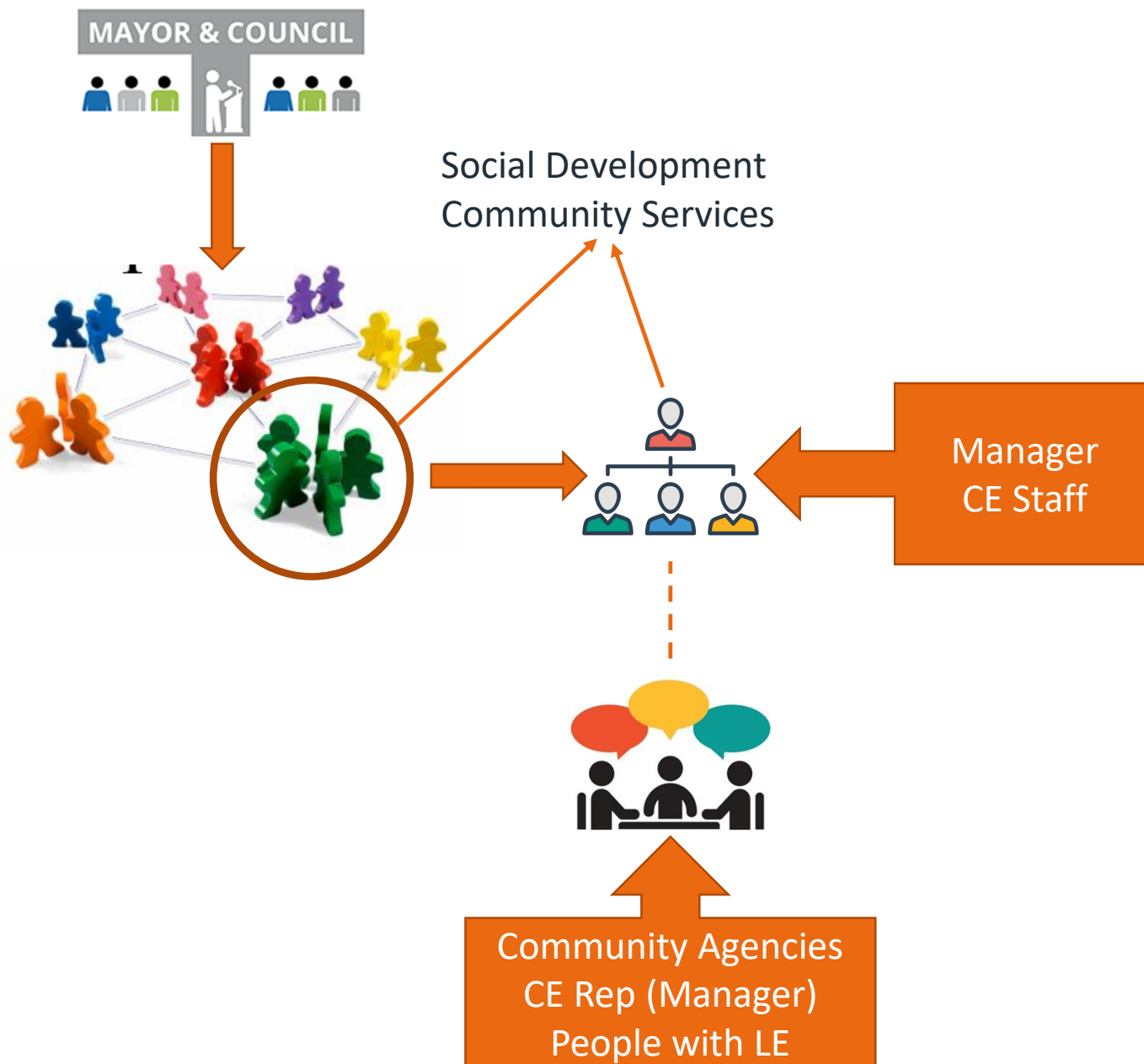
# Municipality as CE

Pro's

- City has greater administrative capacity than many non-profits
- City is not a service-provider and therefore is often seen as a neutral actor for systems planning
- Builds on City strengths of operating community-wide initiatives
- Allows for close interaction with City on both the bureaucratic and political sides
- Brings City into business of homelessness services contract management
- Allows for possibility of deeper alignment with key City departments relevant to housing and homelessness,
- Better access to engage discussion for structural change across three orders of government

Con's

- Not an Indigenous-led entity; this may cause distrust in some communities
- May appear that the City has too much control
- Systems planning expertise for homelessness may not exist within existing staff team
- City bureaucracy may be limited in its ability to harness community momentum
- Limited ability to take risks and innovate
- City mandates may change before plan objectives are fulfilled
- Puts City in hot seat on any homelessness issues as lead on Strategy to end homelessness
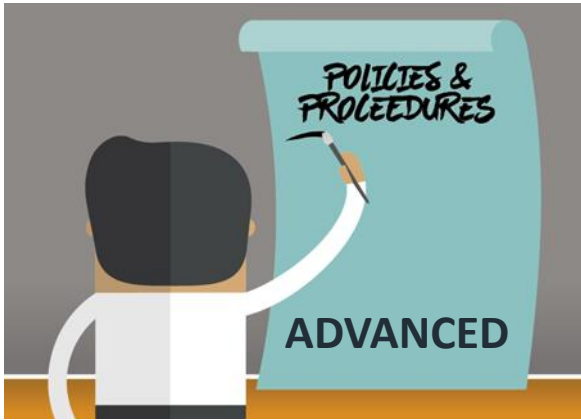
Policies
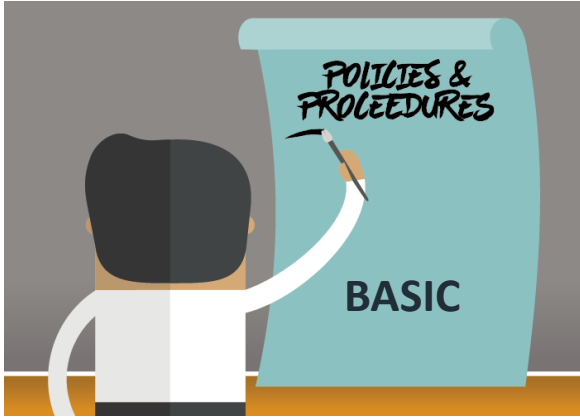
Communities should develop policies and procedures outlining how the coordinated access process operates (e.g., the process for evaluating individuals' eligibility for assistance). While the purpose of the policies and procedures is to help govern the operation of coordinated access, they should be made publicly available if requested.
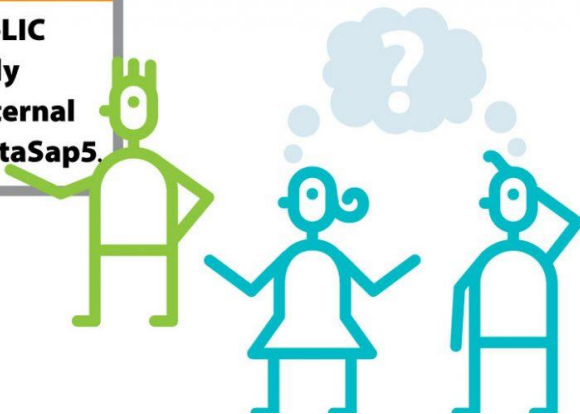
RH 4 Policy Requirement

Policy and Protocols Checklist

1. Participant Consent
2. Standard Assessment
3. Prioritization
4. Matching and Referral

ADVANCED

Transparency

General public, including anyone affected by the policy, can read and understand.

DBO and non-LIC tickets are only reported to internal S-team via DataSap5.

Removal of acronyms, jargon, unnecessary words and advanced vocabulary

POLICIES & PROCEEDURES

2.

CA Scorecard Policy Component

CA Scorecard 2.0 Questions

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RH:	0
Basic:	0

1.2 **Has your community ensured that your CA policies are:** (Advanced)
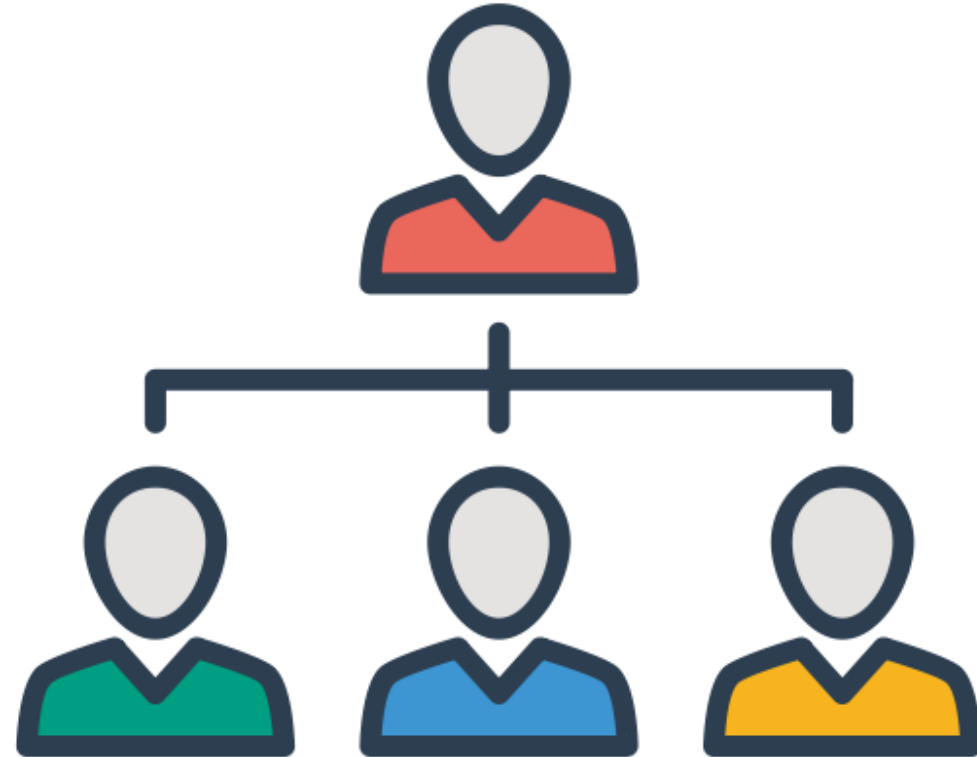(Note: required RH policies are included in Q11, Q13, Q16 and Q19)

☐ Written in plain language
☐ Publicly available

Advanced:	0

CE Staffing

"**There has to be a system leader.** This management body is ideally a dedicated team positioned and approved by system participants to provide oversight, guidance, monitoring and evaluation and the development of the CAS policies and procedures. They would ensure best practices within the system, and most of all, they work to keep the CAS consistent and in fidelity to the Housing First approach and the established community process. All of this would be done by incorporating feedback from community including persons with lived experience."

"What is a Coordinated Access System?"

BLOG

SYSTEMSPLANNING
C O L L E C T I V E

"Dedicated, highly capable human resources are essential to systems planning, which require an ongoing lead organization with dedicated, highly qualified personnel. "

- System Planners
- Lived Experience Expertise
- HIFIS/HMIS Coordination (Data Infrastrcture)
- Data Analysis & Monitoring
- Communications and Community Engagement
- User Design
- Program Development and Support
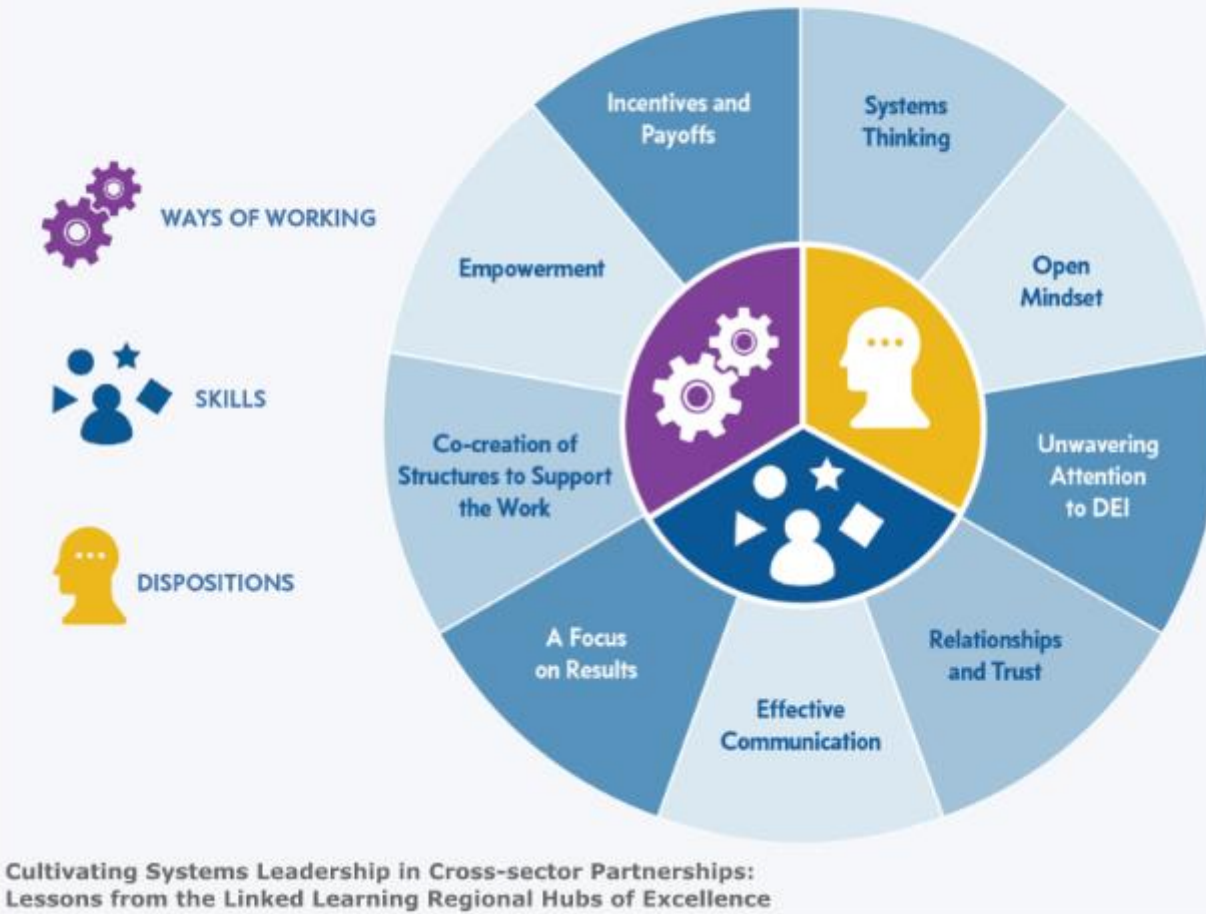- Government Relations
- Fundraising

Additional Skills

Adaptive Leadership

- Focus people's attention
- Create sense of urgency in community without overwhelming
- Frame issues as opportunities
- Facilitate culture of testing and measuring ideas
- Convene stakeholders
- Mediate conflict and build trust

Nine Characteristics of Effective Systems Leaders

WAYS OF WORKING

SKILLS

DISPOSITIONS

Incentives and Payoffs

Systems Thinking

Open Mindset

Unwavering Attention to DEI

Relationships and Trust

Effective Communication

A Focus on Results

Co-creation of Structures to Support the Work

Empowerment

Cultivating Systems Leadership in Cross-sector Partnerships:
Lessons from the Linked Learning Regional Hubs of Excellence

EQUAL MEASURE

- Reaching Home CA Guide (to be released fall 2019)
- System Planning Collective (SPC) Learning Module 4: Governance Models in System Planning (note this is for system planning generally and not necessarily specific only to your Coordinated Access system). Other SCP Learning Modules that may be of interest (e.g., stakeholder engagement, system planning 101 and planning for change)
- HUD Exchange Coordinated Entry Community Samples Toolkit – Planning & Management and Oversight
- RFQ and Application for Coordinated Entry - sample RFP that was used to solicit organizations to participate as access sites in the Charlotte Continuum of Care (CoC's) coordinated entry system
- Policies and Protocols Checklist (required policies and protocols for Reaching Home)
- Sample policies and protocols from other communities can be found on the BFZ-C website Coordinated Access page
- HIFIS support and resources

- Sample training and support resources include:
  - BNL/CA Training and Technical Assistance (CAEH):
    - Built for Zero Canada (for BFZ-C participating communities) with BFZ-C website BNL page and resources (for all communities)
  - Homeless Learning Hub (COH)
  - OrgCode
  - System Planning Collective
  - C4 Innovations
  - Form your own local training centre. Sample Canadian community-based training centres: Core Collaborative Learning Hamilton || Toronto Hostel Training Centre || Waterloo HHUG Housing Stability Training Centre || Alberta 7 cities Online Learning Resource (SCOLR)

training.caeh.ca

Thank You

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▶ Canadian Alliance to End Homelessness

Next BNL/CA Webinars

October 10 CoP: Peterburough CE Staff – Getting started
October 31 Webinar: Iain De Jong (Org Code) on Access

1:00 Eastern Time