

Future Direction for the CAC

DRAFT

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Introduction

This document summarizes what we heard at the strategic sessions from earlier in the year. It joins that insight with the results of scanning the non-profit sector and looking into what different organizations are doing while keeping an eye on broader trends in the world.

The intention of this work was and is to consider potential directions for the CAC that can be resilient (flexible, adaptable, focused). The first part of this work was to consider purpose since it sets the ultimate direction. Once the purpose is understood, subsequent activities can be undertaken to build out the resilience in the structure of the organization.

No detail is included on the present or historical structure because we are working to imagine an alternative future. Several people have offered the opinion that the present structure is not sustainable.

Purpose

Simply, the meaning of what we are doing - what we are aiming for and the guide for staying in alignment. At the most basic level, purpose must either be about change or preservation. The CAC - because it is focused on the resolutions of social challenges - is self-evidently in the change business. Preservation of the status quo is not in the interests of the CAC. This emerges in the responses to the activities we completed together.

Whatever purpose the CAC or anyone else settles on, it must be clear, it must be relevant, and it must be significant in order to engage and direct people. Nothing is really possible without clarity because no one will understand what we are doing. It needs to be original in order to fill a need in the marketplace of ideas - either in a better way or, preferably, in a way that is not already happening. There is abundant feedback from the non-profit sector and beyond that additional organizations forming with the same value proposition as those on offer by several others is not desirable.

No matter how impressive the framework for the organization looks, it will mean nothing if it means nothing to people who serve the purpose and those that the purpose is to serve.

In non-profit work and the voluntary sector, people often take the purpose for granted but it is not effectively shared much of the time because of this unexamined assumption. Passion does not equal purpose.

We arrived at the purpose through an explicit and participatory process.

CAC Purpose - The Diversity of Ideas

We carried out a dialogue around a number of purposes that were offered up individually in a diverse setting. We had the following listed:

CAC facilitates discussion/actions between the different sectors and stakeholders/funders. Speaks with one voice (ideally).

To provide direction to the Calgary Homeless Foundation (CHF) around how the 'community' wants them to move the ten year plan forward.

To ensure that CHF board and senior management have information regarding ground level realities experienced by those experiencing homelessness and those providing services to the homeless.

The CAC is the voice of the community to address the issue and provide solutions with regard to poverty and homelessness.

Be the community voice of the city's social service sector and give recommendations on program priorities for funding.

Community group bringing together sectors to ensure common and sector goals are being met. Assure transparency with regards to funders, protect members and enable real voices through secret ballot voting.

Represent the community and advocate for agencies.

To provide feedback, guidance, and support to the community and the CHF in the pursuit of ending homelessness in Calgary.

To facilitate the development and and/or maintenance of programs and services to move individuals out of homelessness or threat of homelessness.

Community voice, watchdog, networking/collaboration of groups

To provide a forum and a vehicle for Calgary's homeless serving sectors to identify and provide solution to root causes of homelessness.

Inform the work of the CHF to address/end homelessness.

The CAC exists to provide an avenue/portal through which the collective opinions/facts/experience can be communicated in order to bring about solutions to complex issues, with a desire to bring about the best results for all concerned.

Processing the Diverse List of Possible Purposes

After generating this list, we started explicitly pulling apart the logic of the statements so that we could better understand the assumptions, implications, points of view, and consequences of following them. Everyone had to act like they believed them to be true and effective so that they got a fair hearing. The final step was a series of exercises where the various ideas were critically evaluated and finally winnowed down in a bout of forced consensus. We arrived at the four most significant purpose statements:

To ensure that CHF board and senior management has direction about the ground level realities experienced by those experiencing homelessness and those providing services to the homeless around how the 'community' wants them to move the ten year plan forward.

To provide feedback, guidance, and support to the community and the CHF in the pursuit of ending homelessness in Calgary.

To provide a forum and a vehicle for Calgary's homeless serving sectors to identify and provide solutions to root causes of homelessness.

The CAC exists to provide an avenue/portal through which the collective opinions/facts/experience can be communicated in order to bring about solutions to complex issues (and root causes), with a desire to bring about the best results for all concerned.

The Implications of Homelessness and the CHF

Faced with these final four statements and getting ready to make a push toward a single, final suggestion, the group grappled with the heavy presence of the CHF and the issue of homelessness in most of the statements. It was clear that the CAC was defining itself in the light of this single issue. Yet it was just as clear that this was a source of some difficulty that boiled down to two key points:

Many of the people and agencies working with the CAC, were concerned about other issues or how other issues played into the issue of homelessness. The single focus made it hard for many people to pay enough attention to the CAC (except when RFPs were being offered).

The CAC could no longer see itself in any way that was not tied to the CHF.

The implications of these two points for the health of the CAC are obvious and do not point to a strong future if left untended. It is important to point out that none of these concerns reflect a lack of interest or focus on the homelessness issue, dedication to The Plan to End Homelessness or working with the CHF. They point to a lack of individual definition that actually weakens the probability of making the best

contributions to the process of reining in homelessness. There were a number of expressions of a feeling of acute powerlessness.

The results of this dialogue converted the four statements to look like this:

- To ensure that (anyone who needs it) has direction about the ground level realities experienced by those experiencing (insert complex social issue here) and those providing services to the (insert complex social issue here) around how the 'community' wants them to move their plans forward.
- To provide feedback, guidance, and support to the community in the pursuit of ending (insert complex social issue here) in Calgary.
- To provide a forum and a vehicle for Calgary's social serving community to identify solutions to root causes of (insert complex social issue here).
- The CAC exists to provide an avenue/portal through which the collective opinions/facts/experience can be communicated in order to bring about effective solutions to complex social issues (and root causes).

Everyone agreed that homelessness was the key focus of the moment but also felt that the power of the collected voices and wisdom could work on other issues and the activities of the CAC might be more attractive to more agencies if there was the explicit potential for a broader view.

The Focus on Problems

What is important to note in the results of this entire process is the focus on 'issues' and 'solutions.' This is natural since most of the agencies and the sectors themselves have grown from a desire to address recognized problems. This leads to the discussion of a service provider model for agencies and the scarcity-based competition for resources to fund the provision of the services.

Part of the early process with the group was to collect anonymous impressions of what the barriers and difficulties are for the CAC and, in addition to the aforementioned points about the relationship with the CHF and the issue of homelessness, the competitive concern was well represented. In the context of the CAC, this is a limitation and an opportunity we will revisit later in the document.

So here is the final consensus statement:

Draft Purpose Statement for CAC

To provide a forum for Calgary's social serving community to remove barriers and generate opportunities to address social issues through systemic change.

A number of salient elements emerge from this statement of purpose:

- It is a place created for the agencies and not for the general community. Ultimately, each of the agencies and the sectors explicitly understands that they are in business to help their clients. However, the specific mechanism of the CAC serves these 'end users' by being a place for the agencies to work together.
- It is a community and communities are made of constituents. Constituents are not clients. Constituents are interested in transformation while understanding that transactions do still need to occur. A community can function in many different ways to support positive outcomes for their constituents and the constituents they ultimately serve.
- It is a forum. A place to exchange information and ideas. A place to reach understanding. There was explicit discussion around the fact that it cannot simply be information sharing or a place where people come and report/advocate about their particular agency or sector. It must be a functioning place where progress is made based on the inherent diversity and collective intelligence of the participants. There are several ways in which this can be focused and generating clear and accurate shared understanding is certainly one of the most important.
- There is an important recognition that the removal of barriers is an intelligent approach for facilitating change. More desirable than pushing harder against the barriers.
- There is an explicit interest in using the alchemy of the group to generate opportunities
- It is focused on systemic change - addressing the deep connections and interactions that drive, not only pathological and undesirable activity, but also the best possibilities for the community. Systemic change is something that cannot be done alone. It requires access to and representation from the points of contact in the systems and a commitment to and understanding of the systems view.
- It is about social issues, issues rooted in the function of community. The CAC isn't concerned with anything that doesn't attach itself to the social fabric of society. It is also important to recognize there is a deliberate generic intent in using the words 'social issues.' Homelessness is a key focus right now, but there are other complex (or in some cases, not so complex) social concerns that the CAC can address. Even homelessness, joined as it is with other issues like poverty, urban planning, and addictions, is an excellent candidate for this approach. This is a vital concern of the

CAC - that it NOT be defined by the needs or strictures of a single issue in isolation. This last point relates strongly to the passion of the group and its members.

Every activity that CAC engages in must align with the purpose.

Relevant Trends in the Non-profit World (and beyond)

There are a number of common conversations occurring in the non-profit world. Some of them were echoed in our discussions, others I have summarized from research and from dialogues with the constituents. Many of these trends are issues or difficulties. They all represent an opportunity for CAC at some level. Either that and/or a cautionary tale.

Uncoordinated action

The sense that there are a number of passionate people and agencies hard at work in the world but not having the impact they could because they are not coordinated with each other or taking a deep enough view of the challenges before them. Some are also stifled by overly rigorous frameworks that don't easily allow informal and perhaps transient collaborations. Finally, there is a fractured view of the landscape that is not benefiting from a more cohesive conception that spans many points of view and tells a story based on empirical data.

Business mindset

A frequent cry is heard and that cry is that non-profits should operate more like businesses. There is a sense that 'business' is a model for non-profits to follow. This idea rests on a number of difficult assumptions about both for-profit business and the non-profit sector. Assumptions that may not stand up to close scrutiny. Nevertheless, it is a key discussion. Here is an interesting challenge to some of those assumptions while incorporating some of the uncoordinated comments:

'The non profit sector is based on a competition for resources and that forces a lack of collective action and a poor distribution of needed services in most parts of the world, as well as poor growth of human capital and experience in organizations where knowledge and experience are the greatest potential assets. This competition works in the market place because the market only needs a few companies to produce certain products that can be distributed throughout the world. However, poverty is in many places and thousands of like-kinded organizations need to be in those places, each doing world-class work. A better operating system would lower the costs of acquiring resources and do more to improve the distribution.' - Daniel Bassill (www.tutormentorexchange.net)

There are some valid points though. Thinking about the following - and again, thinking about coordination and the collection of knowledge - is useful: What is the market analysis? Are there redundancies? Overlapping missions? Overlapping funding requests to accomplish the same or similar ends? Where are the opportunities for strategic alliances with other organizations, for profit, non-profit or governmental, that will create a more effective response to the need and solve it sooner? Should we merge with another organization, or separate ourselves from the current organizational structure? What criteria would we use to make that decision? Does our strategic plan follow our ends, or does the tail wag the dog? These are the kinds of questions all sorts of organizations should be asking themselves. It isn't clear that business has a monopoly on them only the assumption that they are trying to be more efficient than other sectors.

The elusive art of non-profit measurement

There is no profit to be measured so other things have to be measured. Other things need to be measured in businesses too. Non-profit organizations that do well in the measurement of other things, can export their knowledge to for-profit environments.

Effectiveness of interventions

This addresses the effectiveness of outcomes. Recent conversations with the World Health Organization reveal that there is too much emphasis on doing things (e.g., awareness raising) that are checkbox activities and not enough emphasis on the much more difficult business of dramatically shifting outcomes.

Focus on problems

The struggle of non-profits becoming primarily a service sector instead of a community builder (as identified by John McKnight and others). This has tended to shorten the continuum of attention in certain areas resulting in an inadequate emphasis on system-based effects further up the timeline. It also has the tendency to make most people clients and not constituents leading to a transaction focus instead of a transformation focus.

Funding model is tilted towards projects and programs

There is insufficient funding available for core function in non-profit organizations. There is also an opinion that it is more difficult to access funding to address complex systems-based approaches.

Blurring of the space

The non-profit world has been accused by many of increasingly looking like the tax-exempt marketing arm of industry and that there needs to be greater transparency in the funding arrangements. This includes what expectations the sponsor has for its

message. It also relates to the processes utilized to scrutinize proposals and award funds.

Recommendations for CAC

Organizational leadership is really about design. Design is elegantly defined as the coordination of elements to bring about the best possible realization of a particular purpose.

Is the CAC needed?

In a word, yes. There is a compelling case for the CAC. A diverse organization that has its finger on the pulse of the broader community's social well-being as well as the needs of the constituent organizations and individuals who support that community. An organization that is able to organize both effective responses to issues and proactive steps to improve the social well-being of the city. There is no similar organization in Calgary. Perhaps Thrive and Momentum come in contact with some of this but they have an explicit focus around the economic considerations. They are certainly organizations that should be tied into the CAC but they are not competitive with the purpose of the CAC.

Organizations of this kind can not only transcend the mechanical silos of agencies and sectors, but they can transcend the focus on service delivery to identified problems and bring about a focus on building the social infrastructure of a city or region so that there may be less problems with clients to serve.

They also help defend and expand the space for the different agencies and individuals to do their best work. They can form powerful single voices that can use the combined political strength and capital to advocate for structural changes that we know have the largest impacts on community capacity and well-being.

What will the CAC do?

There are a lot of things the CAC can do that are consistent with its purpose. There are a few roads that the organization should not go down. One of those would be the direct provision of services. Being seen to compete for the same funding as the agencies and that populate the landscape that the CAC wants to support would be another example of something that should be avoided. It is possible that the CAC could attract funding that not only supports its own operation but could be available to researchers and service providers.

Having a clear purpose makes it much easier to know what fits and what doesn't. There are four organizing concepts that underpin the core activities of the CAC. The first concept is the central concept.

Marketing

In the fullest sense of this term, not just advertising and brochures. Like the human nervous system. It senses both internal and external factors, analyzes and evaluates the input, and then determines what steps need to be taken to respond (e.g., moving, speaking, etc.). This is one of the great strengths of a diverse network of agencies and people spanning a whole dimension of what is required to build and maintain a healthy community. This requires a structure in order to work effectively and it needs to maintain openness to the emergent properties of the environment.

There are a wide number of initiatives, consistent with the purpose, that can fall under this focus. Gatherings become opportunities for focused dialogue and collaborative creation. Not many meetings meet that standard in the business, government, or non-profit sectors.

Relationships

The nature of a meta-organization is its network. If that network is not strong, the organization cannot succeed. Think about the human nervous system without all the connections between the senses and the brain or the brain and the muscles - we wouldn't know what was happening and we wouldn't be able to respond even if we did. Processes need to be put in place to support this network of relationships.

Evaluation

This is the 'thinking' part of the network. The CAC is already involved in the review of proposals for funding. Ultimately, the funder always makes the decisions on where the funding will go, but having access to an arm's length group that specializes in critically evaluating proposals provides a very important and unusual service. It dramatically increases the value and power of the organization.

Another version of this service is the review of social issue related research proposals that are searching for funding either from the CAC directly or through an aligned funder.

In both cases, combining the diversity of experience, viewpoints, and wisdom inherent in the CAC membership with some basic process and specialized education in evaluation, delivers significant value to funders and researchers as well as to the constituents of the CAC.

There is a third dimension of the evaluation picture. A number of programs and initiatives are running in the community and this same specialization in understanding and evaluating proposals can help in doing the same for activities that are already underway. This is also a great assist to the resource-strapped agencies and to the funders. In this sense, the CAC is continually seeking to understand what is happening in the community and what initiatives or responses are needed to most completely and systematically improve the situation.

Advocacy

One of the potential responses to the collective understanding generated by this organization is the strong expression of empirically based arguments to those who have the power to alter any situation. This addresses the concern expressed by the WHO that what is needed is more emphasis on substantive changes to the structure of society and its built elements and less band-aid service provision or awareness campaigns.

As a result of advocating based on understanding, the CAC should have the capacity to help support the creation of new ventures in the social serving space in Calgary. These ventures will most often be virtual coalitions of shared interest directed at specific goals that can come and go as the need does. This is one of the ways that the CAC can support a flexible position that is open to an emergent environment. Structure of the CAC becomes a vital consideration if this is going to be achieved.

How it does it

The function of the CAC must be organized to meet the declared purpose. It must also operate in a way that reduces costs (of all kinds) and preserves or increases value. For constituents, costs are unlikely to be money and more likely to be hassle, friction, and time. Further detail on fundamental elements is offered here:

Structure

The design that would best suit the purpose of the CAC is one that builds on the constellation model advanced by Tonya and Mark Surman, principals in The Centre for Social Innovation in Toronto (see diagram on page 12). It supports the marketing-based mechanism discussed above and allows for flexibility. It does not need to precisely match the diagram, but follows the spirit of the idea.

There are three important features referred to as 'Enabling Factors' that underpin the success of this model and they speak directly to the reduced costs mentioned above:

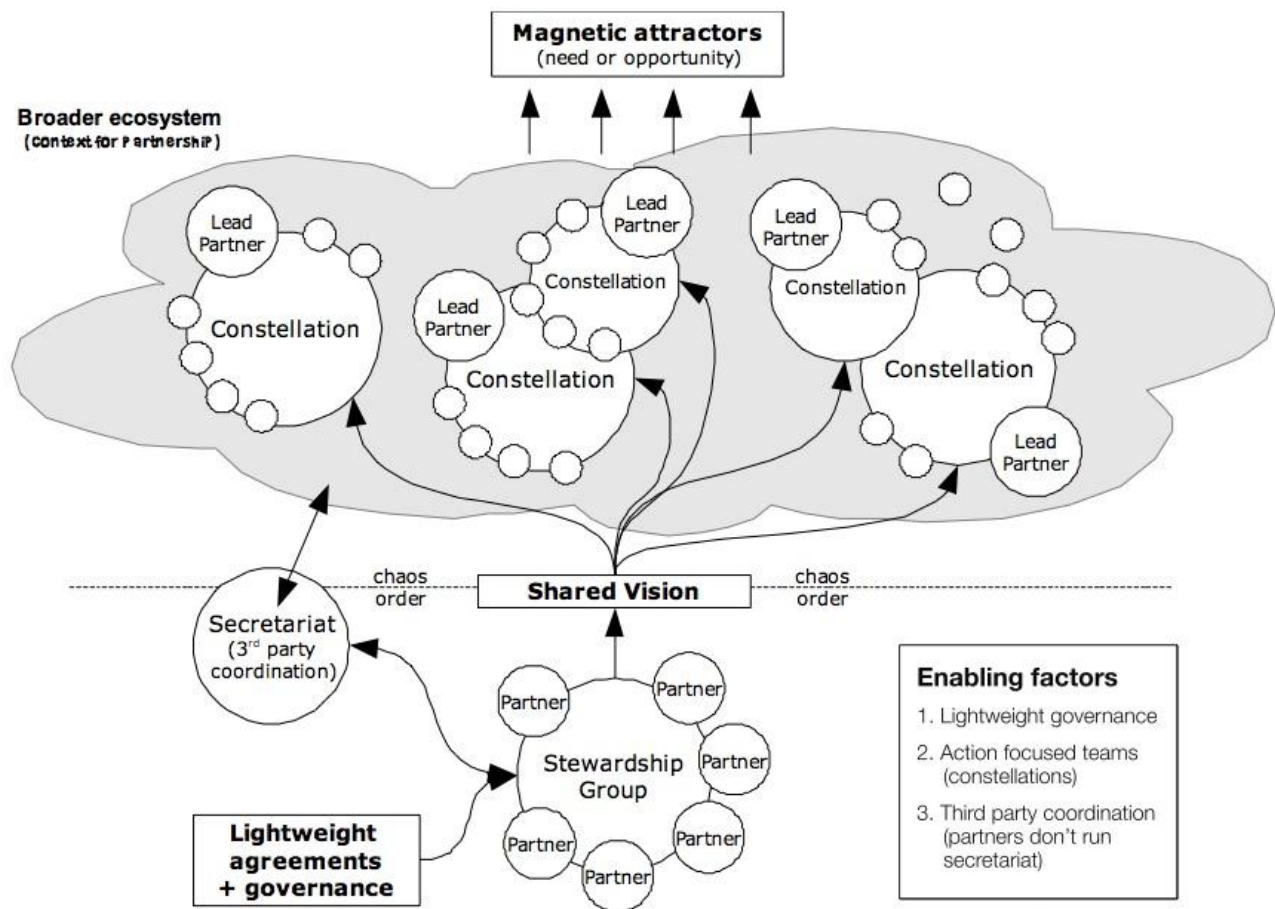
Governance must be lightweight

Teams (Constellations) are ACTION focused

Partners/constituents do NOT run the organization - they form the stewardship group

It will be a flat organization with the effort directed at the contact points with the purpose. It could be a model organization in many respects. It is the brain of meeting the needs of the opportunity. It has a memory and the capacity for coordination and sharing of knowledge.

The partners must be representative of the broader ecosystem. This will mean a slight expansion of the focus from the current structure.



Process

After mentioning structure and the constellation model, it is important to emphasize that it must be based on processes - the way things happen. Organizations are often put together in a mechanical way where structure means STATIC. Everyone knows their position in a hierarchy but strangely, these positions are usually disconnected from the way things happen. Things get done ONLY through process and it makes the best sense to organize the structure to support the critical processes. Ironically, this seems almost odd or uncomfortable and that is because we have spent so much time being exposed to the mechanical organization. An example of basic structure would follow this outline:

- Executive Director
- Innovation and Development Director
- Inside Relationships Director
- Outside Relationships Director
- Resourcing Director
- Marketing Director

These roles need not be filled by separate people but the roles must be kept straight to keep them consistent with the way things are done.

Champion

Organizations don't thrive without champions. Even the best designed organizations are lost without the accountable champion who carries the torch and maintains the relationships. This needs to be a paid and full-time position. There may be needs for other staff (along the lines of the process-based direction outlined above) but those won't be determined until the full structure is designed in detail. The champion needs to be supported by a board representative of the total community with responsibilities, expectations, and accountability clearly delineated.

The Next Steps

These are the immediate steps. A focused approach will have the organization in place in a matter of months. There will be a number of details around its technical status (e.g., non-profit, charitable status) that will need to be attended to but they are peripheral to the central concepts. The development work occurs in parallel with the ongoing operation under the current model. A full shift to the new model occurs only when there is confidence that the conditions are supportive.

Determine if this is the direction to go. Is there commitment?

A committed group of about four individuals can work with a consultant to build out the detail of the organization. The primary function of this group is to act in a consultative manner on the development of the organizational detail and form the core of the stewardship group during the transition. The time commitment will be between eight and 12 hours a month.

Report on the progress at monthly intervals

Begin to shift the behaviour of the CAC into alignment with the new purpose immediately (in parallel to the development of the organization).