
Feasibility Study to Examine Permanent Homeless Shelter Services in South Georgian Bay Area (Collingwood, Wasaga Beach, Clearview Township)

Prepared By:

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Contact

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1. Declaration of No Conflict of Interest

OrgCode Consulting, Inc. and its staff have absolutely no conflicts of interests in the preparation of this proposal or the execution of the work.

2. Proponent Information

Introduction

OrgCode Consulting, Inc. (“OrgCode”) is pleased to submit this service offer to conduct a **neutral examination** of whether a permanent homeless shelter is warranted in South Georgian Bay, which is generally understood as encompassing Collingwood, Wasaga Beach and Clearview Township in Simcoe County, Ontario. Our intention is to look at the facts from the available data, and with the input of local stakeholders, and against the backdrop of the main currents of thought and practice in sheltering, develop a recommendation on whether or not a shelter in this geographic region is warranted, and if so, to provide commentary on size and model for service. If the shelter is not warranted, our intention is to provide commentary on ways of addressing homelessness in South Georgian Bay without a shelter.

About OrgCode

OrgCode specializes in homelessness and housing. Our work takes us to Australia, the United States and throughout Canada. We work with all orders of government and non-profit organizations to improve their results in homelessness and housing. We pride ourselves on being catalysts for better outcomes.

We conduct work in the six following areas:

1. Planning, Policy Development & Evaluation

OrgCode develops plans with communities serious about ending homelessness and improving housing outcomes. Fluent in government regulation and policies related to housing and homelessness, OrgCode engages deeply with the community and people with lived experience to create vibrant, actionable

approaches that are aligned to best practice and the main currents of thought in the available grey and academic literature.

OrgCode develops policies that marry community, government and/or organization objectives with operational realities. We believe that policy reflects the guiding principles of the community, government and/or organization and influences decisions and actions. In the context of housing and homelessness, we believe that good policy improves housing outcomes, reduces homelessness, and means that homelessness is rare, brief and non-recurring. Policy development, in our opinion, should add value and benefit for the people most impacted by the policy, while being transparent in the proposed outcomes and reason for the policy. Policy should reflect the strategies, goals and values of the community, organization and/or government, and it should provide a practical implementable framework for realizing its objectives. When built upon defensible qualitative and quantitative data, a meaningful policy should be easily understood and concise.

OrgCode evaluates programs, policies and plans to help communities, organizations and government improve their results in serving people through homelessness programs and housing. We believe a prudent evaluation examines give core elements: Formation; Context; Impact; Process; and, Outcomes. The result of an OrgCode evaluation is a call to meaningful action in concrete steps that are both achievable and increase buy-in for the intended results of the program, policy or plan. We believe that evaluation is a key component of continuous improvement, and the lynchpin to making the Deming Cycle (Plan, Do, Study, Act) come to life.

2. Training

OrgCode's training motto is simple: *training that doesn't suck*. We believe we must be both relevant and engaging for training to resonate. We believe that if action does not change as a result of our training, we have failed. OrgCode's desire is to see practitioners, leaders and policy-makers all trained for the demands of the work in a way that they feel confident and qualified to improve housing and end homelessness.

Primarily we offer training on the following topics:

- *Assertive Engagement*
- *Coordinated Access*
- *Housing Based Case Management*
- *Housing First*
- *Housing Focused Sheltering*
- *Housing Focused Street Outreach*
- *Motivational Interviewing*
- *Performance Management*
- *Rapid ReHousing*
- *Service Prioritization Decision Assistance Tool (SPDAT)*
- *System of Care*
- *Team Leadership*
- *Trauma Informed Care*
- *Wellness, Recovery & Harm Reduction*

3. Products

OrgCode creates products that are useful to the housing and homelessness services industry, many of which are disseminated for free. We believe that practitioners in the field do their best work when equipped with the best tools. Quite often engagement can be improved and tasks for easily completed between frontline staff and program participant if the right tools are in place.

The most popular of our products is the Service Prioritization Decision Assistance Tool and its associated suite, which is the most used homeless services assessment tool in the world. We believe in a fair and transparent process for assessing people's needs and ensuring vulnerable people get the housing resource best suited to their needs.

4. Data

OrgCode believes that data fuels the engine of change. As we move from hunches, anecdotes and opinions to proof, decision-making is improved, programs are refined, and outcomes are realized in ways previously thought impossible. There are three primary ways OrgCode is renowned for its use of data:

- a) *Homeless Management Information Systems* – OrgCode has expertise in driving deep into the numbers of an HMIS to better inform systems of care, operations and investment. We also are Systems Administrators for communities, managing the HMIS on behalf of communities and taking care of analysis and reporting.

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- b) *Data Analysis* – OrgCode has expertise in compiling data from multiple sources and then undertaking multi-variate analysis to make sense of the data and inform policy and practice. We also have considerable expertise in creating reports based upon the data analysis.
 - c) *Modeling* – OrgCode has expertise in creating complex models for forecasting demand in housing and social services. The OrgCode Housing Forecast Model has been instrumental in helping dozens of Canadian and American communities transform their thinking about affordable and supportive housing for various population groups.

5. Leadership Development

OrgCode believes in nurturing and training leaders in the housing and homelessness industry to create innovative, resilient, adaptive, professional leaders. Over the past few years, we have helped more than 800 established and emerging leaders in the industry take the next step in their development. These have primarily occurred through the *OrgCode Leadership Academy in Ending Homelessness*. In addition, the senior staff of OrgCode and its Leader in Residence, coach more than a dozen senior executives in the industry on a regular basis.

6. Thought Leadership

OrgCode embraces innovation and research. We create white papers, standards, frameworks, blogs and podcasts for the housing and homelessness sector. The Senior Staff of OrgCode are frequent keynote speakers at housing and homelessness conferences. The President of OrgCode is an often sought after commentator on homelessness and housing matters in the media, and is the author of *The Book on Ending Homelessness*.

3. Relevant Experience

OrgCode has completed an extensive array of work related to homeless shelters. Below is a description of a handful of projects from the past few years related to shelters, with a description of each:

- Canadian Shelter Transformation Network: OrgCode are the technical advisors to the Canadian Shelter Transformation Network (CSTN). The CSTN is a group formed by the Canadian Alliance to End Homelessness to make shelters more housing-focused throughout Canada.
- Calgary Drop-in Centre: OrgCode has been on a journey with the largest shelter in Canada to decrease lengths of stay, improve diversion services, and improve housing outcomes. Since starting more than 200 chronically homeless individuals have exited shelter for positive alternatives, most of which is independent housing.
- Crossroads Rhode Island: OrgCode has helped the organization take all of its shelter services for different population groups and ensure that they are focused on housing outcomes. Crossroads, located in Providence, Rhode Island, is often cited by the National Alliance to End Homelessness as a model for shelter transformation in the USA.
- Front Steps: OrgCode, in partnership with the National Alliance to End Homelessness, worked with this Austin, Texas shelter to orient their services towards housing outcomes. An examination of data and policies and procedures, as well as observations on site, resulted in an array of other service improvements to the facility, and in particular, focus on being more responsive to higher acuity program participants.
- Grace Marketplace: OrgCode has worked extensively with this shelter in Gainesville, Florida to become lower barrier and housing-focused. Unsheltered homelessness in the immediate vicinity of the homeless shelter was also a focus of the work, in integrating services and approaches into shelter that appeals to an unsheltered population that historically has not made use of shelter.

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- LA Family Housing: OrgCode has journeyed with the organization to infuse more housing-focused practices into all aspects of their operations. Housing-focused services have expanded exponentially, increasing throughput within shelter services. OrgCode has also been instrumental in assisting with harm reduction services being infused throughout all shelter services.
 - San Diego City and County: OrgCode is in the early stages of work to examine and reorient all shelter services in the City of San Diego and surrounding County. The intention is to help the entire shelter system become lower barrier and housing-focused. Gaps in service delivery are also being identified and strategies to address the gaps are being developed.

4. The Proposed Work

We propose that the work be completed in two phases. Phase 1 is about determining if a shelter in this area of Simcoe County is warranted. If the conclusion to Phase 1 is affirmative, then the Phase 2 work will be warranted. If the Phase 1 conclusions are negative, then Phase 2 will not be warranted.

PHASE ONE

Item One: Communication and Project Plan

The key to success for projects of this nature is to establish set intervals for communication between the consultant and the client, and to establish milestones to be reached and timelines and resources required to achieve each milestone for the project. We prefer to work with the client to establish these milestones and the format/approach to communication (e.g., memos, emails, Zoom, GoToMeeting, phone calls, etc.)

Budget: \$200

Item Two:

Survey

We will develop and analyze a comprehensive electronic survey that explores a range of opportunities and potential issues with a permanent shelter in the South Georgian Bay area.

The client will be responsible for identifying the initial list of people to receive the survey. The client may choose to send the survey link and invitation to engage rather than OrgCode.

Budget: \$1,750

Item Three:

Key informant interviews

We will complete up to 12 key informant interviews. Using a semi-structured interview process, we will engage with these stakeholders to understand their perspectives on a permanent shelter being added to Collingwood, Wasaga Beach or Clearview Township.

OrgCode will use a qualitative analysis framework to identify themes and trends emerging from the key informant interviews.

The client will be responsible for identifying the list of key informants to be interviewed, and may be involved in assisting with scheduling.

Budget: \$2,200

Item Four:

Data analysis

There are three types of data that will need to be analyzed:

- 1) Data on homelessness in the proposed catchment area
- 2) Data on homelessness across all of Simcoe County
- 3) Economic data on financial feasibility of opening and operating a permanent shelter in South Georgian Bay

It is assumed that the client can provide access to data on items 1 and 2. OrgCode will use proxy data from other Ontario communities to determine operational feasibility.

Note: OrgCode does not anticipate conducting feasibility analysis on any particular property. We understand this to be a study of feasibility of a permanent shelter within this particular area of Simcoe County, not as a feasibility study of a particular property as a shelter.

Budget: \$3,250

Item Five: Preliminary recommendations

OrgCode will prepare preliminary recommendations in a draft report. The draft report with preliminary recommendations will be provided to the client in Word. The client has full autonomy to share the preliminary recommendations and draft report with any stakeholder they feel is relevant to the discussion of a permanent shelter in the South Georgian Bay Area.

Budget: \$4,750

Item Six: Comments on preliminary recommendations

We recommend the preliminary report be shared with the expectation of a two week turn-around time on providing comments on the preliminary recommendations. It is expected that:

- a) The client will consolidate comments and provide OrgCode a single edit version of considerations for the final report;
- b) OrgCode and the client may need to discuss instances where local stakeholders have offered conflicting opinions/insights on the preliminary recommendations.

Budget: \$2,200

Item Seven: Preparation of Final Report and Recommendations

Based upon the feedback received on the preliminary recommendations, OrgCode will prepare a final report with recommendations on the feasibility of a permanent shelter

service in South Georgian Bay. A PDF version of the final report will be submitted to the client.

Budget: \$4,400

PHASE TWO

If the conclusion of Phase One is affirmative – that a permanent shelter in the South Georgian Bay area of Simcoe County is warranted – then OrgCode will initiate Phase Two. If the conclusion of Phase One is negative – that a permanent shelter in the South Georgian Bay area of Simcoe County is NOT warranted – then OrgCode will not need to engage in Phase Two.

Item Eight: Co-plan the Shelter with Community

Engaging the same stakeholders in Phase One, the intention will be, through a series of virtual focus groups (a minimum of three focus groups), to articulate what a culturally-appropriate shelter model should look like for this area of Simcoe County.

Budget: \$2,700

Item Nine: Recommend Governance & Decision-Making Structure

Based upon the shelter model that the community wishes to have, OrgCode will prepare and recommend a governance and decision-making structure for the development and operations of the shelter moving forward.

Budget: \$1,750

Item Ten: Recommend Operating Model

Based upon the shelter model that the community wishes to have, and the main currents of thought and practice in sheltering, OrgCode will outline an operating model for the new shelter. This will serve as the blueprint for implementation moving forward.

Budget: \$4,400

Item Eleven: Recommend Staffing

The operating model selected will inform the staffing model that is needed to safely and effectively operate the shelter. This will be informed based upon guesstimates from community leaders of the volume of guests to be served at any particular location that may host the shelter in the South Georgian Bay region. Staffing will also outline roles and responsibilities of the various staff members moving forward, in alignment with the operating model.

Budget: \$2,500

Item Twelve: Recommend Training

The operating model and recommended staffing compliment will both inform the training requirements for staff to engage in any new shelter and effectively deliver services aligned to the model selected.

Budget: \$200

Item Thirteen: Recommend Processes and Procedures

OrgCode will develop draft policies and procedures for the shelter based upon work with comparable shelters in other jurisdictions.

Budget: \$4,400

5. Timing

OrgCode can commence work on the project within four weeks of approval to proceed. We will develop a communication and project plan as the first step of the project to ensure milestones between the start of the project and the completion date, as agreed to between OrgCode and the client.

6. Intellectual Property

The existing content, idea(s), work product(s), solution(s) and materials that OrgCode brings to the project will remain the property of OrgCode in perpetuity.

The final report conclusions are the property of the client, and can be disseminated in the final submission form to any entities that they choose to share the findings with, at the client's sole discretion.

7. Talent

Four members of the OrgCode team will be involved this project:

Iain De Jong is the President and CEO of OrgCode. He has more than two decades of experience working in homelessness. In the first decade of his career, Iain was extensively involved in municipal policy development, funding and operations of shelters, and over the past 10 years, Iain has helped dozens of non-profits and governments assess and improve their shelter delivery practices, including the introduction of new shelter facilities. Iain is also the author of *The Book on Ending Homelessness*. In this project, Iain will participate in the survey development, key informant interviews, development of preliminary recommendations and the final report in Phase One, and co-planning, help articulate the operating model and policies and procedures in Phase Two.

Tracy Flaherty-Willmott is the Associate Director with OrgCode, overseeing the work of all of the associates on the team. She has more than two decades of work in the sector. Tracy has been involved in various shelter studies and longer-term consulting engagements to improve operations in specific shelters. For this project, Tracy will be the project manager and main operational contact with the client. Tracy will be involved in the initial kick-off and development of project plan, ongoing communications with the client, survey design, survey analysis, key informant interviews, developing draft recommendations, and the final report in Phase One. In Phase Two, she will co-plan the shelter, develop a governance structure, help articulate the operating model, make recommendations on staffing and training, and help develop the policies and procedures.

Erin Wixsten is an Associate with OrgCode, with the company going on five years. She will assist with survey design, survey analysis, key informant interviews, and

developing recommendations in Phase One. In Phase Two, Erin will assist with co-planning the shelter, developing an operating model, articulating staffing and training needs, and developing policies and procedures.

Ciara McNally conducts a considerable amount of data analysis with OrgCode. She will lead the analysis of survey results and qualitative analysis of key informant interviews. She will also lead the analysis of economic and homelessness data for the project.

8. Budget Summary & Proposed Payment Schedule

We do not want our fees to be a hindrance to you. We are open to negotiation and amendment prior to the commencement of the work.

In summary, the proposed fees for each stage of the work are as follows:

PHASE	ITEM	TITLE	BUDGET
ONE	1	<i>Communication and Project Plan</i>	\$200
	2	<i>Survey</i>	\$1,750
	3	<i>Key Informant Interviews</i>	\$2,200
	4	<i>Data Analysis</i>	\$3,250
	5	<i>Preliminary Recommendations</i>	\$4,750
	6	<i>Comments on Preliminary Recommendations</i>	\$2,200
	7	<i>Final Report and Recommendations</i>	\$4,400
TOTAL PROFESSIONAL FEES PHASE ONE			\$18,750
TWO	8	<i>Co-plan the Shelter with Community</i>	\$2,700
	9	<i>Recommend Governance</i>	\$1,750
	10	<i>Recommend Operating Model</i>	\$4,400
	11	<i>Recommend Staffing</i>	\$2,500
	12	<i>Recommend Training</i>	\$200
	13	<i>Recommend Policies and Procedures</i>	\$4,400
TOTAL PROFESSIONAL FEES PHASE TWO			\$15,950
TOTAL PROFESSIONAL FEES PHASE ONE AND TWO			\$34,700

Applicable taxes will be charged in addition to the professional fees outlined above.

We propose the following payment schedule for your consideration:

PHASE ONE

Upon execution of agreement	@15%	\$ 2,812.50
Upon completion of survey and interviews	@30%	\$ 5,625.00
Upon submission of preliminary report	@15%	\$ 2,812.50
Upon submission of final report	@40%	\$ 7,500.00
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		\$18,750.00

IF THE WORK PROCEEDS TO PHASE TWO

Upon submission of operating model	@40%	\$ 6,380.00
Upon submission of policies and procedures	@60%	\$ 9,570.00
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		\$15,950.00

9. Conclusion

We hope and trust our service offer provides you with confidence that we can complete the work to your satisfaction. We would be happy to answer any questions of clarification.



Iain De Jong
President & CEO
OrgCode Consulting, Inc.