After Action Review
Follow Up Report

**Presented to EMYS, Lead Agency for the MOMH Toronto Service Area by:
Peggy Schultz and Peter O'Donnell**

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A Brief Backgrounder…

With any significant change initiative it is important to review periodically not only the results of the project but the change process as well. This is especially true when the process itself represents a major shift from past change management practices. East Metro Youth Services chose to utilize a Collective Impact process to fulfill its mandate as the Lead Agency for the Moving on Mental Health/Toronto (MOMH/TO) system transformation initiative. There are a wide range of other indicators on which to report progress – many of which are embedded in the project proposals and plans submitted to the funder. The purpose of this report is to provide a summary of a separate 'After Action Review' conducted recently, which gathered feedback on the Collective Impact process from the perspective of many of its key participants.

There has been considerable attention given to the Collective Impact model in recent years. There are five main components in this approach to creating social system change:

- A Common Agenda
- A Shared Measurement System
- Mutually-reinforcing Activities
- Continuous Communication
- A Backbone Support Organization

All five of these components have been activated to a greater or lesser degree in the first year of this project, but there is much to be done going forward. The decision by the funder (MCYS) to implement a Lead Agency strategy to bring about system transformation itself establishes a common agenda framework and provides the resources to establish the required support organization – the so-called 'backbone.' To be effective, the new 'system' must involve heightened collaboration, continuous communication and, ideally, a shared measurement system to support system-wide planning and decision-making.

This brings us to a key question: 'How are we doing on these elements one year in?' The After Action Review (AAR) model is uniquely suited to addressing this 'developmental' evaluation question. Developed almost two decades ago as an alternative to more traditional 'backward looking' approaches, an AAR is more focused on identifying the lessons learned from a review of past action. The focus then shifts naturally to applying this learning to future action… a parallel process of Before Action Planning, complete with ongoing learning and experimentation.

The basic framework of the AAR looks like this:
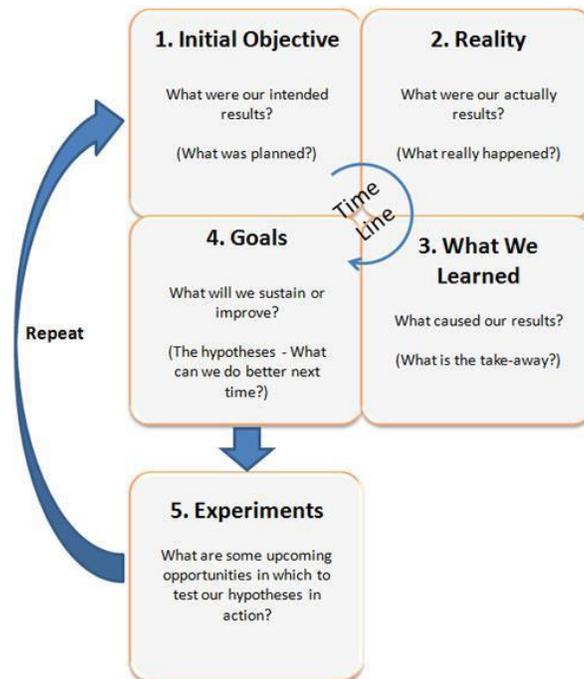
There is no need in this report to replicate the information provided elsewhere regarding the planned and actual activities of 'the collective', all of which are summarized in the Lead Agency proposals and year-end activity reports. This report will focus on the key lessons learned as revealed in a series of interviews and dialogues with the participants most closely involved with the process.

A Summary of the Process…

Between February 23rd and March 16th, Peggy Schultz facilitated the following feedback sessions:

- Working Group Chairs (2/23 – four current chairs)
- Working Group Participants (2/25)
    - Patty Hayes (Central Point of Access)
    - Ekua Asabea Blair (Communications)
- Project Partners (2/26)
    - Charlie Carter & Jana Kocourek (Ontario Centre of Excellence)
- Funder (MCYS) (3/1)
    - Gale Lariviere (Program Supervisor, Toronto Region, Children's Mental Health Lead
- Core Services Agencies Meeting (3/3)
    - Executive Directors from almost all Core Services Agencies
- Lead Agency leadership staff (3/16)
    - Claire Fainer (ED) & Roberta Bustard (Lead Agency Strategy Director)
- Lead Agency Backbone team (3/16)

○ Darren Fisher, David O'Brien, Tanya Pobuda, Alisha Singh, Janice Wiggins

This process obtained feedback from a large and diverse number of participants, and also provided opportunities for all to identify key insights and their implications for the next stage of development.

Key Insights & Implications for Future Action…

While the various interviews and discussions were unique and wide-ranging, there were a number of commonly-stated key insights. What follows is a brief summary and thoughts about how to translate these 'lessons' into future action.

Launching the Collective Impact Process:

The success of any Collective Impact initiative is determined by the degree to which it engages 'the collective' as early as possible. Before the first meeting of the agency EDs, there had been a number of individual discussions, but the June 3rd meeting was the first opportunity for this key group of stakeholders to come together. A number of EDs likely expected to be 'told' what the master plan entailed, and hoped to have the chance to comment on it. Instead, they were put to work right away, working in groups to surface issues to be addressed, and using this input to draft the mandate statements for the four Working Groups that formed the core structure of the year one collective effort. This set the tone for the subsequent ED meetings, and began the shared effort to establish the foundational components of Collective Impact.

In the AAR interview and dialogue sessions, there were a number of shared insights: the process started quickly and sped up from there, with signs of progress along the way, but also a sense of 'flying blind' at times, and occasionally wondering 'Will this actually work?' During the course of the year, most participants felt positive about what was being accomplished and there was a growing sense of commitment and momentum, supported by a genuine spirit of generous collaboration.

The work of the four Working Groups was often cited as being both essential to achieving the first year goal of building a foundation for future action, and also the means of engaging many more people from all corners of the agency network. Their work, and the opportunities at each all-agency meeting for reporting and feedback, demonstrated the potential of pursuing a common agenda, contributing to mutually-reinforcing activities, and improving continuous communication. Significant progress was made on framing the requirements for a shared measurement system, establishing criteria for a single point of access strategy, and mapping current services. All of this created a rich context for the emerging work of the backbone support organization.

Other common insights regarding the 'launch' included the realization – painful at times – of the workload challenges facing everyone involved in the process, coupled with both general and specific capacity limits that made it difficult to move more quickly in some

areas. At the same time, the backbone organization was itself being 'built on the fly.' There was little time for thinking or planning, and the added pressure of developing systems and processes quickly. Despite this – and the newness of the people and the process itself, there was mainly positive feedback regarding how it all worked, and on the quality of the working relationships.

Importantly, year one concluded with this 'experiment' in developmental evaluation. There has been broad, constructive participation by everyone involved, resulting in collective learning to guide the transition from launch to sustained growth.

Acknowledging Complexity:

Another important theme emerging from the feedback conversations is that both the current 'system' and whatever form it transitions to in the future – is extraordinarily complex. The Core Services Delivery Agencies are more different than alike, although they share many common desires and challenges. This presents both the obvious challenge of creating a system that works equitably for all of its members and, at the same time, takes advantage of the diversity that exists in each.

An essential step in addressing this complexity is the building of relationships, beginning with identifying the various 'players' and what makes them unique. Many of the participants in this process have commented on how beneficial it has been to spend time together, and also to begin to gather a wealth of practical information about each other's work.

What has emerged over time, though, is the need to define more clearly the various 'entities' that make up the overall system, their unique roles, and their influence within the system, both currently and in the future. Those entities include the individual service agencies, the MOMH collective, as well as other collaborations, 'tables' and partnerships in which they participate. All of these individual and connected entities influence each other, and all are experiencing varying degrees of change (intentional or not… desired or not.) There is a common concern that, with the need to develop an even broader collaboration around the community mental health plan, the weight of maintaining service deliver will become even more onerous. And, there's also the matter of designing a governance structure that makes sense when more and more of the work involves shared planning and delivery initiatives.

There are other key entities whose role and influence must be addressed. One is the funder, of course, with its stated intention to change how it works with all of the above service providers and collaboratives. It's not clear how that will look going forward, particularly its influence on funding decisions that it suggests will shift to the Lead Agencies. This leads inevitably to questions concerning the role(s) that East Metro Youth Services fills. There are at least three such roles: Lead Agency, service agency and 'backbone support', the latter also incorporating whatever Working Groups and other structures are established to do the work. Not only is this a challenging 'balancing act' for EMYS internally, but it complicates its relationships with all of the other entities.

There is a widely-felt need to clarify these roles and relationships. It's a conversation that needs to begin soon, both internally and in the collective forum.

Beginning the Shift from Competition to Collaboration:

As stated earlier, there has been largely positive feedback about the way people from across the system have begun to do actual work together, whether in the Working Groups, or through the ED sessions. An example of a tangible product of collaborative planning is the expansion of the walk-in service model, which was triggered by a funding opportunity offered by the Ministry, and developed from input at an ED session. This was the first 'collective' initiative, and stands as a good example of what is called 'lean experimentation.' The response to the approval of this initiative was overwhelmingly positive but, at the same time, there were comments about how it was essentially an expansion of an EMYS program, and involved only a few additional service agencies in its implementation.

This is a good illustration of the challenge of moving from what has been a somewhat competitive system, where individual agencies focus on growing or maintaining their unique services (and budget allocations), to a more collaborative system. That's why the underlying objective of considerable effort in this first year has been to build trust among the service agency leaders, a necessary step to creating a collaborative 'space.' For the collective effort to be effective, there must be transparency and a willingness to 'seek and tell the truth' to each other. The result will be both increased collaborative action and innovation, and a 'safe space' in which to surface and discuss fears, risks and disagreements on issues to do with funding, service delivery, clients, agency autonomy, etc.

Again, the feedback from many participants has been largely positive, but others have pointed out the need for further dialogue on what it means to work collaboratively, how to maintain appropriate individual agency focus, what shared leadership means. These questions need to be part of the dialogue described under the previous heading.

Communication & Engagement:

Not surprisingly, given what's been summarized above, the topic of communication and engagement was a frequent source of comments. There has been considerable effort devoted to planning and implementing a wide-ranging communication strategy. There has been no shortage of information to disseminate, reports and proposals to circulate, knowledge/resources to be shared… not to mention countless formal and informal conversations. Not only is this a core component of Collective Impact… it's also the chief means by which work gets done in the social sector. As in the case of the other themes, the feedback has been largely positive. People have appreciated being kept up to date on Ministry developments, the ongoing work of the Working Groups, and such.

What is also clear is that, until now, communication has been almost entirely among the funded core services agencies and, even there, mainly with agency leaders and staff

that have been invited to participate in the Working Groups. In an effective Collective Impact strategy, what is essential is establishing connections with the wider community of stakeholders… clients, other service providers and sub-sectors, and beyond. This scope and level of engagement goes beyond the 'mandated' requirement to develop a Community Mental Health Plan which, itself, is still primarily aimed at connecting service providers.

A number those involved in the feedback process commented on the need to begin to reach out to clients… others felt it was time to engage agency boards at the collective level… still others expressed the need to engage all agency staff. All of these 'audiences' have important questions to be addressed, they answers to which will both strengthen and shape their participation in the overall process. In addition, there is the need to 'map' what is already a rapidly-expanding network of connected organizations and individuals… a network that will continue to grow exponentially. The Communications Working Group has done much important groundwork in this area, and developed a broad plan for implementation in the next phase. This needs to be a priority from the beginning of the next year.

Transforming the System:

All of which brings us to the primary purpose of the whole undertaking… transforming the system that delivers mental health benefits to children and youth across Toronto.

A frequent comment in this area is that, while there has been much activity in this first year, what is still lacking is a comprehensive shared vision for what the system of the future will be… how it will be different than the current system… what will change in how services are delivered and to whom… what results will improve… why, in the end, it will have been worth the investment.

Bringing that vision to life will require a huge commitment to building collective intelligence, improving collaborative capacity, establishing new shared systems and processes, addressing the challenge of shared governance and leadership and, ultimately, shifting the current power dynamics. If successful, one result of Collective Impact is that the 'collective' will be positioned to exercise its influence more fully and more strategically by continually learning its way into the future… ongoing transformation will be its 'guiding star', not the need for periodic 'corrections.' This venture must develop such a vision, and ensure its action are guided by it at every level.