Holistic Planning - Definition

All organizations carry out planning activities - whether for project management, evaluation, board development, strategic direction or the delivery of government-funded services. Planning may occur at many levels within an organization including agency-wide and departmental activities. These activities can be formal or informal and designed either internally by an organization or externally by a funder. For the purposes of this report, the objective of planning is to support a group or agency to evaluate, design and deliver services within a community.

The term "holistic planning" refers to the wider, cross-agency sharing of materials as well as the intent to take a broader perspective on organizational planning. This may result in accessing data or outcomes developed by various community organizations in order to strengthen the value of individual agency strategies. For instance, literacy programs may access data generated by a social planning council related to poverty and low education achievement rates in order to better plan where to situate a new literacy program location. In other words, holistic planning is a multi-service approach to acquiring the widest possible breadth of information to orient a program's activities towards high quality outcomes.

Holistic Planning - Objectives of Training Session

The Durham Workforce Authority and Literacy Network of Durham Region partnered to initiate several focus groups aimed at increasing the local social service community's capacity to share and collaborate on planning activities. An invitation was sent out to a community stakeholder list of 250 agencies. A total of 20 individuals participated in two mirrored half-day sessions facilitated over approximately three hours apiece.

The agenda included several guiding questions around agencies' regular planning processes and ideas for moving forward the concept of holistic planning.
Participants were asked the following:
1. What planning activities does your organization carry out regularly or annually?
2. What information including data would be helpful to your organization's planning activities?
3. What sectors, groups or agencies would you like to connect with for planning purposes?

The session objectives were identified as follows:
- Allow organizations to share planning materials
- Connect and network with other similar organizations
- Create future work teams to plan together
- Share and strengthen results through collaboration.

Outcomes of the sessions informed the development of key themes and recommendations as well as a "demonstration" project concept as attached as an appendix.

The final report for the focus groups is intended for wide distribution amongst regional social and community service agencies. It is hoped that this report will elicit interest in supporting this collaborative work into the future.

Holistic Planning - Session Themes

Data Consortium
Participants recognized the increasing importance of data and research to support grants, attract employers, assist clients and improve the quality of service delivery in Durham Region. In many instances, the data held by the organizations is not shared. For many organizations the cost of purchasing data can be a significant barrier. Occasionally there are instances where the data required by one organization has already been purchased by someone else. There was discussion about the creation of a data consortium for Durham Region that would allow organizations, community partners and municipalities to access and analyze data sets from various sources, including Statistics Canada in a cost effective manner.

Hierarchy of Data
Not all data is equal, and not all data will be useful to every organization, community partner and/or municipality. A hierarchy of data refers to how data is collected and the type of result produced. Academic research, for example, is at the top of the hierarchy of data due to stringent methodology assessments and ethics review. There is a need to address data collection methodology so other organizations, community partners and municipalities can ensure the validity of data.

Community Asset Mapping
Community asset mapping aims to build strong communities by mobilizing existing community strengths to solve systemic problems, and improve the quality of life for residents. Community asset mapping allows organizations and individuals to leverage the supports, programs and services already in place within the Durham Region, determine where gaps exist and potentially develop programs, services and supports to fill those gaps.

Embedding Social Issues
Embedding social issues refers to taking systemic social issues and addressing them within the confines of other, often times more prominent, issues which receive additional funding, or have more salient resources. The specific issues may be defined as any number of community needs, including those articulated by health promotions research, etc. By embedding social issues in mainstream work, organizations, community partners and municipalities are better able to use resources, including staffing, to address a multitude of social issues that persist in the Durham Region.

Funders Network and Education
Historically, Durham Region was home to a funder's network that provided funders with information regarding social issues facing the Region and successes and challenges in addressing those issues using specific means. The funder's network provided education and guidance in various funding domains.

Regional Advocacy
Durham Region programs, services and supports are often underfunded when compared with programming in Western Ontario. There is an increasing need for Durham agencies to address underfunding, and a lack of needed programs, supports and services. With funding being an issue for all organizations, community partners and municipalities, there is a need to band together to better articulate the need across the Durham Region. Regional advocacy allows for the collective voice of the Region to represent the opinions and needs of the organizations, community partners, municipalities and residents to the decision makers.

Holistic Planning – Recommended Actions

Data Consortium, including Data Sharing Agreement
The Durham Workforce Authority with the Literacy Network of Durham Region will endeavor to create a Data Consortium in Durham Region. The Data Consortium will aim help organizations, community partners and the municipalities share the costs of data acquisition. A Data Sharing Agreement will be established. The Data Sharing Agreement will create specific objectives for the Data Consortium.

Labourshed Study
The Durham Workforce Authority will be conducting a Labourshed Study in 2013/2014 which will provide an overview of labour trends within the Durham Region. The Labourshed Study will provide localized information relating to occupations, wages and commuting patterns.

Feasibility Study of Community Asset Mapping
A feasibility study will be conducted to assess the merits of Community Asset Mapping as a beneficial tool for the Durham Region. The feasibility study will seek to determine an appropriate project sponsor, scope and cost for the project as well as potential partnership opportunities.

Demonstration Boutique Project at the Community Level
A demonstration project at the community level will be established. This demonstration will aim to bring together relevant social organizations from the community to design and carry out a project to address a discreet social issue with the community. (See Appendix One)

Data Training
The Durham Workforce Authority and Literacy Network of Durham Region will co-host community training related to the collection, analysis and reporting of various types of data.

Additional Holistic Planning Session
The Durham Workforce Authority and the Literacy Network of Durham Region host an additional Holistic Planning session in 2013 to engage other organizations, community partners and municipalities.

Appendix One

Cross functional approach to resolving social issues

Most social issues require skills, experience and knowledge that exist across organizations. Yet most organizations are funded and operate in isolation with only part of what they need to tackle an issue. This silo structure is usually also present in the funding sources which are usually government departments or ministries. It is not practical to expect these organizations to change their approach anytime soon but there may be an opportunity to do so at a lower level. We could bring together organizations at the community level in projects that resolve segments of larger issues.

These projects would most probably be more effective than current efforts that try to take on challenges that are too large or that deal with symptoms. If there were multiple projects in a community the overall impact on the larger problems could be substantial.

For example the area of youth unemployment and underemployment is significant in size and complexity. The organizations set up to tackle the problem can't be expected to have all of the resources, knowledge, skills and access they need to do so. Instead we need to break the problem down into smaller sub-systems and work to solve them. We also need to bring together the full set of resources required.

One such subsystem could be the unemployment caused by dropping out of high school. If we looked at research around this problem we could begin to design an intervention that starts early enough to have a long term impact. We might see from research that teenagers that dropped out started to exhibit certain behaviours earlier. They might have started by becoming disinterested in classroom activities in elementary school. They may have stopped completing assignments or became disruptive in class. Over time the student will fall behind academically further reducing engagement with the classroom. The poor habits may have increased and evolved into reduced attendance and interaction with poor role models in the community. Eventually the student stops coming to school altogether. This teenager will not have the education level or even the basic skills needed to find employment or to effectively function in society.

The project team would conduct a series of experiments in the classroom intended to modify the learning approach. Short term measures could be put into place to determine if the desired effect is being achieved. Successful results would be replicated and expanded and unsuccessful ones dropped. It wouldn't be necessary to wait three to five years to determine if an action was successful we could undertake course corrections as we moved forward. We could combine the classroom actions with actions in the home (i.e. assisting parents to keep kids motivated), in the community (i.e. sports activities) and the business community (i.e. co-op programs, tours or internships). We would also be building up data and information that was specific to our objectives and that could be shared with other project teams and other communities.

The project would include the relevant social organizations from the community working together to design and carry out the project. The project teams could also draw on experts from outside of the community that could provide insight and data.

If we worked to modify the school programs to keep these and other kids fully engaged early enough we might be able to reduce drop-out rates and eliminate one element of youth unemployment. Other elements of youth unemployment could be handled in similar fashion.

We should consider finding an issue that could be handled in this manner and make a proposal to funding sources for a trial. If the trial is effective and there is interest from other sectors or communities we could begin to affect a change in the approach used by the funding sources.