



# How Karma & Cents is Sparking Social Systems Change in Mental Health



Those who need mental health services bump into a system that is difficult, if not impossible, to navigate. There are long wait times, no set pathways to accessing necessary help, and a broken referral process. Attempting to access mental health care is at best frustrating and often dehumanizing.

For emerging adults—those between the ages of 16 and 24 years old transitioning from adolescence to adulthood—the barriers to receiving mental health services increase. Those in this critical age group have been identified as at risk, yet there is little research and few integrated services to help them gain the support they need to lead healthy and productive lives now and going forward.

## FINDING THE WHITE SPACE

Karma & Cents is a Calgary-based social impact lab for philanthropists. They're keenly interested in solving wicked problems, like food security, homelessness, and the dysfunctional mental health system. The team's strength lies in operating in the white space, seeking out yet-to-be-discovered opportunities to address unmet and unarticulated needs. They then look at these opportunities through the lens of innovation, creativity, and connection.

So when their long-term client, the Hunter Family Foundation, zoomed in on access to mental health services for emerging adults as a key priority, Karma & Cents got to work finding meaningful solutions.

There are no fixed or obvious solutions to wicked problems.

**Wicked problems: extremely difficult or impossible to solve due to:**

- a) incomplete or contradictory or shifting knowledge
- b) the number of people and their viewpoints involved
- c) the interconnectedness of the problem with other problems.

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*We perceived a lack of coordinated funding focused on emerging adult mental health. We felt that Karma & Cents had a good understanding of organizations working in the mental health space and that they would be able to help us identify opportunities to invest bigger dollars into this space.*

**- Mona Hunter, Hunter Family Foundation**

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## ASSEMBLING A PANEL OF EXPERTS

The first step was to identify and analyze any gaps in the existing system. In order to do so, Karma & Cents needed to assemble the right mix of stakeholders.

### 1. Identification

Karma & Cents, alongside the Hunter Family Foundation, began a landscape review of more than 100 agencies in Calgary that identify mental health as a service they provide (either as a core offering or a secondary service). From this, they identified four “best-in-class” service providers, according to their peers within the mental health industry.

### 2. Engagement

Karma & Cents reached out to the four agencies and engaged in one-on-one conversations, compiled the interviews, and extrapolated some key observations. The participants included:

- Robbie Babins-Wagner, Calgary Counselling Centre
- Avril Deegan, Alberta Health Services
- Joanne Weninger, Alberta Children Hospital Foundation
- Laureen MacNeil and then Sara Jordan, Canadian Mental Health Association (Calgary)

### 3. Collaboration

Next, the group was asked to come together in several working sessions to validate assumptions, identify gaps, and—most importantly—find opportunities. This collaboration was a radical departure from the norm—stakeholders are often hesitant to share information out of fear of losing funding, having donors poached, or having programs duplicated. Karma & Cents created an open environment and built trust by spearheading a collaboration agreement signed by all parties, respecting time through punctuality and efficiency, and hosting meetings on neutral territory, among other tactics.

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*There was a lot of respect in the room and every voice was heard and respected. I also think we all had similar goals which was to increase access to care.*

**- Robbie Babins-Wagner, Calgary Counselling Centre**

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## CREATING A SURVEY AND REPORT

What emerged from this collaboration was a report, released in January 2021, entitled Understanding the Current Landscape of Emerging Adult Mental Health Services and Needs in Calgary and Surrounding Areas.

The report used three data components:

### Client Caregiver Experience Survey:

01

An online survey to identify what the current mental health needs and experiences are for emerging adults and their caregivers.

### Population Trends:

02

Analysis of Statistics Canada data to describe the current demographics of the emerging adult population in the Calgary Health Zone.

### Funding, Costs, Service Utilization:

03

Funding Survey, Service Use Survey, inventory search and analysis of administrative data to identify funding distribution, available services and utilization of services for emerging adults.

The survey results showed that services provided in different settings (i.e., health, education and community) offer similar mental health support but are generally not well coordinated with one another.

The report identified several system-level opportunities that could make a big impact, including:

- Evaluating existing service delivery settings
- Promoting client-centred access
- Reducing gatekeeping between mental health delivery settings
- Reducing barriers to information sharing between mental health settings and service providers
- Developing a strategic framework and implementation plan with representation from service providers in all settings
- Create a centre of excellence that convenes industry experts, researchers, technologists, inventors, community agencies and funders to promote innovation and leading practices.

Based on these findings, Karma & Cents got to work with the group to generate a series of actionable recommendations.





## WIDENING THE CIRCLE

One of the most striking recommendations in the report stated the indeed for intersectional conversations. Since the authors called for a body that brings everyone to the table to facilitate those conversations, Karma & Cents sprung into action and spearheaded the task of bringing together 8 organizations in the spring of 2021:



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*Different perspectives often leads to different and collaborative ways of looking at challenges.*

*- Robbie Babins-Wagner, Calgary Counselling Centre*

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The group quickly grew from 7 to 90 people and organizations representing a variety of sectors and industries from across Canada who take part in a quarterly meeting. The national scope was intentional given that every province was experiencing the same challenges and barriers in their respective Mental Health sectors. In spring 2022, the group formalized CONVERGE Mental Health Network as a federally registered non-profit corporation. CONVERGE Mental Health will reimagine Canada's mental health systems—from one that delivers fragmented and often dehumanizing service through disjointed infrastructure to one that promises no wait lists, more access points, and greater coordination.

Karma & Cents side was tasked with building the infrastructure behind, creating the processes for, establishing committees, conducting market research, hiring project leaders, and facilitating pan-Canadian conversations. A board of directors was formed, who meet quarterly and is chaired by Mona Hunter of the Hunter Family Foundation. Five sub-committees of the board were formed to address various aspects of current and future projects:



Technology &  
Mental Health



Public Policy  
& Mental Health



Education &  
Mental Health



Marketing &  
Communications



Governance

- Abridge Consulting | Mental health training
- Alberta Children's Hospital Foundation | Youth Health
- Alberta Health Services | Government of Alberta
- Alvin & Mona Libin Foundation | Funder
- Branch Out Foundation | Funder
- Calgary Board of Education | Education
- Calgary Counselling Centre | Community Agency
- Calgary Health Foundation | Funder
- Canadian Mental Health Association | Alberta Government Relations
- Capitalize for Kids | Financing
- Care Group | Technology
- CASA | Education
- CINIM Mental health | app and platform
- City of Calgary | Government
- Cummings School of Medicine | University of Calgary
- Eating Disorders Nova Scotia | Charity
- Edmonton Police Service | Justice
- Foundation of Family | Funder
- Frayme | Knowledge Translation/Health Canada
- Glenrose Rehabilitation Hospital | Hospital
- Gosbee Family Foundation | Funder
- Graham Boeckh Foundation | Funder
- Henry's Foundation | Funder
- Hotchkiss Brain | Institute Research
- Hunter Family Foundation | Funder
- Islamic Family | Charity
- Kids Help Phone | Charity/Data
- Lionheart Foundation | Charity - Eating Disorders
- Mathison Centre for Mental Health Research and Education | Research
- Mental Health Foundation | Funder
- Montreal General Hospital | Healthcare
- Muskwachis Health Authority | Indigenous knowledge
- Platform | Innovation Centre
- Silver Linings | Charity - Eating Disorders
- Small Business Advisor | HR
- Stollery Children's Hospital Foundation | Youth Health
- The Care Group | Medical technology
- Thin Air Labs | Health Investment Portfolio
- Thumbs Up Foundation | Charity
- Viewpoint Foundation | Funder
- Werklund Faculty of Education | University of Calgary
- YMCA | Social impact advisor
- Zamplo | Technology
- Government Relations

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*None of this—the CONVERGE effort—would have happened without Karma & Cents. Gena, in particular, is a force of nature that brings everybody together and has the vision of what's possible. She also has the ability to strongarm and sweet talk at the same time.”—*

**- Dr. Alina Turner, Co-Founder, HelpSeeker Technologies**

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## MAPPING OUT THE MENTAL HEALTH SYSTEM

With CONVERGE firmly established, the conversations continued but there was now capacity to act on their objectives. They knew exactly where to start—by mapping out the mental health services available to emerging adults. This kind of inventory had never been done.

### Creating an Inventory of Resources

In February 2022, Converge hired HelpSeeker Technologies, a data analytics company, to inventory all the mental health organizations operating in Calgary<sup>1</sup>. It quickly became apparent that they'd need to expand the catchment area since many people were referred to Calgary from rural areas.

Because of the value of the information mined by HelpSeeker, Karma & Cents pushed for the data should remain open source so that other organizations could use it for their own initiatives. To ensure open access, K&C facilitate an arrangement whereby the data is searchable on Helpseeker.org. An API is also being developed to ensure developers and others seeking the data can pull it from Helpseeker's platform. The data can be accessed by anyone looking to understand or improve the state of mental health care in Alberta, and ultimately, across Canada.

Of note: The City of Calgary had also enlisted RA2 Inc., a polling company, to perform a similar inventory. Karma & Cents identified the potential for a synergistic relationship between the companies—and their data—and facilitated a conversation between the two.

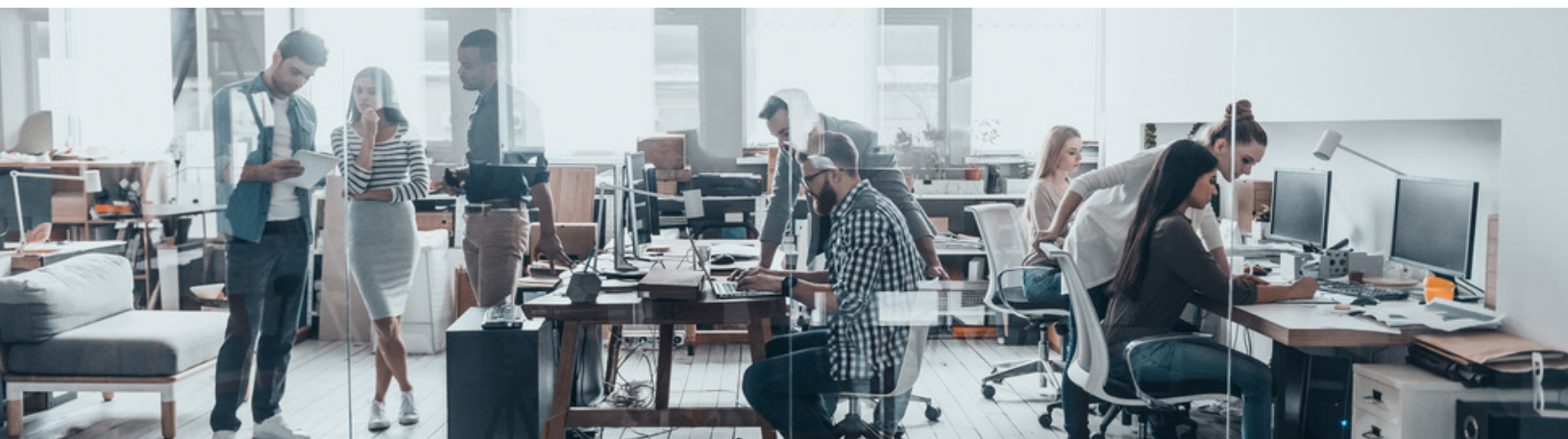
<sup>1</sup>The original catchment area was mapped to what was done in the Emerging Adult report published in Jan 2021.

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*You can't unsee the data. You can't unsee how many billions of dollars are going into mental health in Calgary. You can't unsee how messed up the referral process is. There's value in this information for advocacy and policy work—systems change—*

**- Dr. Alina Turner, Co-Founder, HelpSeeker Technologies**

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## Standardizing definitions of care

Creating an inventory of resources revealed a big problem: Organizations didn't have a standardized way of describing their services offered. For example a crisis centre and homeless shelter may say they offer the same services. But upon closer inspection, their offerings may be limited to certain groups or function quite differently.

How could referrers confidently send individuals for help without standardized descriptions of services provided? And how could funders spend money to move solutions forward without a firm grip on what exactly they were funding?

The solution came in the form of creating a taxonomy and ontology of mental health. Working across sectors and industries the CONVERGE Coalition members including HelpSeeker are creating reporting standards that can be applied to anyone intersecting with the Mental Health Sector (practitioners, funders, technologists, researchers, etc.).

As of publication date, the two companies are now exploring how to create a national taxonomy and ontology of mental health programs and services. This is important because it will help streamline funding, identify opportunities for joint ventures, and facilitate a better referral and client management process between organizations and government agencies.

Importantly, this project supports data interoperability within the mental health field. This milestone will serve as the foundation for countless future data-driven projects, ranging from mapping, visualization, and other forms of representation and analysis.

## Uncovering the bottom line

In June 2022, HelpSeeker presented the findings of their mapping efforts. The system analysis of referral patterns uncovered some jaw-dropping discoveries:

- Referrals get bounced (i.e., patients refused service) an average of 6 times
- It takes up to 5 years to gain access to appropriate mental health services

During the time span that referrals are getting denied and re-directed, an individual's mental health is deteriorating. Meanwhile the costs are increasing—mentally, socially, and fiscally. Individuals are retraumatized everytime they have to tell their story. Caregivers are losing productivity which has economic ramifications. And for some, help does not arrive in time.

## Pushing for transparency

With the data now brought to light, Karma & Cents and HelpSeeker set up a two-day hybrid event—online and in-person—in July 2022 to dive into the referral and waitlist data in Alberta's mental health system. They invited all CONVERGE members to attend; 24 organizations showed up at the table.

The main topic of conversation was the lack of transparency around wait times to access services. In the past, organizations have not been required to publicly disclose their organization's waitlist. Partly, this is due to the perception of funding scarcity, since many organizations worry that funders will abandon them if their wait times are either very short or very long. But this lack of information sharing adds bounces into the system, as organizations receive referrals which they cannot accommodate due to overwhelming waitlist length.

The takeaway? Instead of pressuring organizations to publish waitlists, what if we educated funders on the value of public waitlists in guiding their funding decisions? By showing funders that a lack of transparency contributes to inefficient use of resources, they may prioritize organizations that publish waitlist information.

Since no funder wants to see inefficient use of their donations, CONVERGE is now conducting an economic analysis of the leakage in the system around waitlists, bad referrals, and lost productivity of caregivers.

## THE KARMA & CENTS ADVANTAGE

Karma & Cents was established based on a vision of driving systems change. To bring that vision to life, they work with individuals, entrepreneurs, family foundations and companies to fund solutions to wicked problems. The Karma & Cents team sets out to find out what's really happening on the ground so that their clients' efforts have maximum impact. They ask big questions, dig deep, listen intensely, and bring together diverse groups of contributors to uncover all the angles and overcome assumptions. Then they fearlessly combine strategy with tactics, and vision with action.

Karma & Cents's driving philosophy is unflinching: ***"We don't fund problems, we finance solutions."*** This approach aligns with their clients' desires: to see, feel, and know their financial contributions are leading to impactful actions and positive outcomes.

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*[Gena] has the trust of all these important foundations across the country because she's built that trust and relationship over many many years, and has proven herself to be a trustworthy partner in their philanthropy. So when she speaks, they listen and follow.*

**- Dr. Alina Turner, Co-Founder, HelpSeeker Technologies**

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Founded by Gena Rotstein and Richard Ouelette in 2017, Karma & Cents was established as an external resource to guide family foundations and family enterprises in granting funds to impactful projects. Their clients aren't just looking for tax savings—they're looking to catalyze meaningful change.

Alongside their clients, Karma & Cents works to tackle complex problems such as food security, gender-based violence, and access to mental health resources.



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