

Evaluation of the Research and Data Initiative

FINAL REPORT

MARCH 2021



*Photos taken prior to COVID-19
physical distancing safety measures*

Table of Contents

1 Executive Summary	5
1.1 Purpose of the Evaluation	5
1.2 Program Description	5
1.3 Methodology	5
1.4 Summary of Key Findings and Recommendations	5
2 Overview of the Evaluation	7
3 Program Profile	7
4 Evaluation Questions	9
5 Evaluation Methodology	9
5.1 Literature and Documentation Review	9
5.2 Key Informant Interviews	9
6 Evaluation Findings	10
6.1 Evaluation Question 1: Is there a continued need to enhance expertise and capacity in the housing sector?	10
Finding 1	10
Finding 2	11
6.2 Evaluation Question 2: Are the objectives of the RDI programs consistent with federal government and CMHC priorities?	12
Finding 3	12
Finding 4	13
6.3 Evaluation Question 3: To what extent have the RDI programs contributed to the achievement of intended results of the National Housing Strategy?	14
Finding 5	14
Finding 6	15
Finding 7	16
Finding 8	18

6.4 Evaluation Question 4: Are the RDI programs being delivered in an economic and efficient manner?	19
Finding 9	19
Finding 10	20
Finding 11	20
Finding 12	22
6.5 Evaluation Question 5: Are there more economic or efficient ways to design the RDI programs?	23
Finding 13	23
Finding 14	25
Finding 15	25
7 Conclusions and Recommendations	27
Annex A: Acronyms and Abbreviations	29
Annex B: Key Definitions	30
Annex C: Program Profiles	31
Annex D: Logic Models	35
Annex E: Evaluation Matrix	39
Annex F: Evaluation Methodology and Quality Assurance	45
Annex G: Bibliography	48

Table of Tables

Table 1: Program Description and Allocation	8
Table 2: Evaluation Questions	9
Table 3: Documented Number and Types of Partnerships Formed per Evaluated RDI Program	17
Table 4: Documented Total Budget, Expenditure Data, Commitment Data, and Number of Funded Applicants per Evaluated RDI Program	19
Table 5: Estimated Annual FTE Breakdown per Evaluated RDI Program	21
Table 6: Key Terms Used in the RDI Evaluation	30
Table 7: Lines of Evidence Used to Inform the Evaluation Questions and Main Indicators	39
Table 8: Limitations to the Evaluation Methodology	46
Table 9: BDO and CMHC Evaluation Services Quality Assurance Practices	47

Table of Figures

Figure 1: Number of Informants per Type of Key Internal and External Informants	10
Figure 2: Logic Model Legend	35
Figure 3: Overall Research and Data Initiative Logic Model	35
Figure 4: Demonstrations Initiative Logic Model	36
Figure 5: Solutions Labs Logic Model	36
Figure 6: Research and Planning Fund Logic Model	37
Figure 7: Housing Research Awards Program Logic Model	37
Figure 8: Housing Research Scholarship Program Logic Model	38
Figure 9: Collaborative Housing Research Network Logic Model	38

1 Executive Summary

1.1 Purpose of the Evaluation

The evaluation of the Research and Data Initiative (RDI) was undertaken to inform the National Housing Strategy (NHS) and determine whether intended outcomes are on track to be achieved. The evaluation was conducted by CMHC's Evaluation Services who provide insights that support CMHC's ability to provide evidence-based policy advice to the government on future directions of programs.

1.2 Program Description

The RDI supports the development and dissemination of timely and relevant information to improve innovation and the functioning of the housing sector and to build housing research capacity outside government. It has 10 components: Demonstrations Initiative; Solutions Labs; Research and Planning Fund; Housing Research Awards Program; Housing Research Scholarship Program; Collaborative Housing Research Network; Housing Needs Data Initiative; Expert Community on Housing Initiative; National Housing Conference; and Funded General Housing Research.

All RDI programs support the six NHS Priority Areas: Housing for those in Greatest Need (including NHS Priority Population Groups); Social Housing Sustainability; Indigenous Housing; Northern Housing; Sustainable Housing and Communities; and Balanced Supply of Housing.

1.3 Methodology

This evaluation included questions pertaining to the relevance and performance of six RDI programs, including effectiveness, efficiency, and the alignment of RDI with federal government and CMHC priorities: Demonstrations Initiative; Solutions Labs; Research and Planning Fund; Housing Research Awards Program; Housing Research Scholarship Program; Collaborative Housing Research Network. The evaluation scope was based on the size of the government's financial

investment in a program and CMHC's key questions relating to these programs. The evaluation covered the period from April 2018 to September 2020, which covers two fiscal years.

The main activities conducted to inform this evaluation were documentation review, external literature review and key informant interviews. Key stakeholders engaged included CMHC Program Officials; CMHC Senior Management; CMHC Policy Officials; CMHC Communications and Marketing Officials; Recipients of Funding; Expert Solutions Labs Consultants; Participants of the Solutions Labs and/or Demonstrations Initiative; and Delivery Partners.

1.4 Summary of Key Findings and Recommendations

The evaluated RDI programs remain relevant as there continues to be a significant need to enhance expertise and capacity in Canada's housing sector. The evaluated RDI activities have and will continue to respond to this need by contributing to the knowledge, technical capacity, innovation, and research capacity of the housing sector to inform decision and policy making. They are enabling program recipients and participants to conduct research, form collaborative networks and multidisciplinary partnerships, and develop innovative solutions for housing problems.

There are no other research- and innovation-based programs in Canada that provide support to as wide a range of housing stakeholders to enhance housing research, innovation, and capacity. The objectives of the evaluated RDI programs are consistent and well aligned with federal government and CMHC priorities. Their design will enable CMHC to address both existing and emerging information gaps, priority research questions, and NHS Priority Areas over time through targeted calls for proposals or tailored communications.

The evaluated RDI programs have consistently received a high number of applications every year. The programs receive more applications than they can fund, making the application process highly competitive. Key strengths of these programs include the utilization of a review panel to assess applications and using CMHC's housing sector network to increase awareness of these programs. Through 117 funded applicants over the period of 2018 to 2020, the evaluated RDI programs have supported 50 innovative solutions and over 100 knowledge transfer activities. This has facilitated approximately 600 new or existing connections, collaborations, and partnerships, and connected with approximately 4,500 stakeholders. This is a significant contribution towards engaging housing sector stakeholders and providing opportunity for recipients to collaborate internally and externally within the housing sector.

The suite of evaluated RDI programs are perceived as being delivered in an economic and efficient manner; the team resources dedicated to the administration and delivery of these programs is perceived to be operating on a very lean basis. Partnering with the tri-agencies (Canadian Institutes of Health Research, Social Sciences and Humanities Research Council, and National Sciences and Engineering Research Council) for the **Housing Research Scholarship Program** and the **Collaborative Housing Research Network** has worked well and contributed to the economical and efficient operation of these programs.

There are some areas for improvement. First, ensuring that CMHC is systematically mobilizing knowledge and disseminating results will be key to ensuring the evaluated RDI programs remain on track to contribute to enhancing expertise and capacity in Canada's housing sector. Second, while performance indicators for the evaluated RDI programs have been developed, the required infrastructure to facilitate data collection is not fully developed. Finally, there are opportunities to better track the longer-term impacts and outcomes of funded RDI projects. The evaluation proposes the following four recommendations:

Recommendation 1

Increase the use of existing reporting infrastructure and the CMHC NHS website to:

- a) enhance knowledge mobilization activities in support of the broader RDI objective of enhancing expertise and capacity in the housing sector; and,
- b) facilitate and advance reporting of interim and final results of projects over the next several years.

Recommendation 2

Review existing reporting requirements for RDI programs to ensure adequate and relevant performance information is collected and allow for the reliable and consistent reporting on interim and final results.

Recommendation 3

Make greater use of CMHC's broader corporate infrastructure and channels to better tailor and disseminate information about calls for proposals, announcements of supported proposals, the completion of projects, and the publication of information about project outcomes.

Recommendation 4

Increase the availability of detailed information about the published listing of expert consultants for Solutions Labs to indicate their key areas of expertise and housing specialty.

2 Overview of the Evaluation

This report presents the results of the evaluation of Canada Mortgage and Housing Corporation's (CMHC) Research and Data Initiative (RDI). The RDI is a component of the National Housing Strategy (NHS) and is administered by CMHC on behalf of the Government of Canada. The evaluation was undertaken to inform the NHS and determine whether intended outcomes are on track to be achieved. The evaluation was conducted in accordance with the Program Evaluation Standards adopted by the Canadian Evaluation Society and the Treasury Board Secretariat 2016 Policy on Results. The evaluation team was composed of CMHC Evaluation Services and BDO Canada LLP.

The purpose of the evaluation was to provide an assessment of the RDI that will:

- Assess key lessons learned and performance results; and
- Identify and propose actions for improving the program in future years.

This evaluation included questions pertaining to Relevance and Performance of six RDI programs including their effectiveness, efficiency, and the alignment of RDI with federal government and CMHC priorities. It covered the period from April 2018 to September 2020, which covers two fiscal years.¹ This is the first discrete evaluation of the NHS RDI.

Acronyms and abbreviations are provided in [Annex A: Acronyms and Abbreviations](#) and terms and definitions related to the Research and Data Initiative are provided in [Annex B: Key Definitions](#).

3 Program Profile

The RDI aims to enhance housing data and research. It supports the development and dissemination of timely and relevant information to improve innovation and the functioning of the housing sector and build housing research capacity outside government. All RDI programs support the six NHS priority areas: Housing for those in Greatest Need (including NHS Priority Population Groups); Social Housing Sustainability; Indigenous Housing; Northern Housing; Sustainable Housing and Communities; and Balanced Supply of Housing.

Six RDI programs were included in the scope of this evaluation: ***Demonstrations Initiative***; ***Solutions Labs***; ***Housing Research Scholarship Program***; ***Housing Research Awards Program***; ***Collaborative Housing Research Network***; and the ***Research and Planning Fund***. The first five programs are managed by CMHC's Innovation Division and the sixth is managed by CMHC's Research Division.

The evaluation scope was based on the size of the government's financial investment in each RDI program and CMHC's key questions relating to these programs. As such, the four other RDI components were not included in the evaluation: Housing Needs Data Initiative; Expert Community on Housing Initiative; National Housing Conference; and, Funded General Housing Research.

¹ As such, the 2020 Demonstrations Initiative Competition was excluded from the scope of this evaluation.

Table 1: Program Description and Allocation

Program Name	Description	2018/19	2019/20	2020/21	TOTAL
Demonstrations Initiative	Assists affordable housing stakeholders to demonstrate and showcase innovative practices, technologies, programs and strategies and improve the performance, viability and effectiveness of affordable housing solutions to better meet the housing needs of Canadians.	\$500K	\$1,500K	\$1,500K	\$3,500K
Solution Labs	Assists stakeholders from all sectors across Canada to co-develop solutions to housing-related issues that address the NHS goals and priority areas and contribute to the expected outcomes of the NHS.	\$500K	\$3,000K	\$3,000K	\$6,500K
Research and Planning Fund	Supports non-profit organizations, registered charities, Indigenous governments, and Indigenous organizations who are undertaking housing research to build collaboration, engagement and alignment with stakeholders working to achieve common goals, and support the housing community's research capacity development.	\$600K	\$750K	\$750K	\$2,100K
Housing Research Awards Program	Supports research teams to expand their work and share their knowledge and recognizes activities that are impactful and innovative in Canadian housing including: housing research; research training; and knowledge mobilization and outreach. It builds on and sustains Canada's research-based knowledge culture across all fields related to housing.	\$50K	\$450K	\$450K	\$950K
Housing Research Scholarship Program	Funds postdoctoral fellows undertaking research projects that address housing related issues identified under the NHS priority areas. This program is undertaken in co-operation with three federal funding organizations: Social Sciences and Humanities Research Council (SSHRC); the Natural Sciences and Engineering Research Council (NSERC); and the Canadian Institutes of Health Research Institute of Population and Public Health (CIHR-IPPH).	\$50K	\$50K	\$50K	\$150K
Collaborative Housing Research Network	Supports independent, Canada-wide collaboration of academics and community partners that focus on researching housing conditions, needs and outcomes to provide objective, recognized, and high-quality research that supports housing policy decision-making and inform future program development. It is supported as a joint initiative by CMHC and by the SSHRC.	\$400K	\$1,250K	\$1,750K	\$3,400K
TOTAL (\$M)		\$2,100K	\$7,000K	\$7,500K	\$16,600K

*These figures are without operations and maintenance/administrative costs.

More detailed program profiles can be found in [Annex C: Program Profiles](#) and the logic models for these programs can be found in [Annex D: Logic Models](#).

4 Evaluation Questions

Table 2: Evaluation Questions

Relevance	Performance	
	Effectiveness	Efficiency
1. Is there a continued need to enhance expertise and capacity in the housing sector?	3. To what extent have the RDI programs contributed to the achievement of intended results of the National Housing Strategy?	4. Are the RDI programs being delivered to clients in an economic and efficient manner?
2. Are the objectives of the RDI programs consistent with federal government and CMHC priorities?		5. Are there more economic and efficient ways to design the RDI programs?

For additional detail and for a list of indicators and sub-indicators, please refer to the Evaluation Matrix in [Annex E: Evaluation Matrix](#).

5 Evaluation Methodology

The evaluation was conducted using a mixed-method approach which included:

- Literature and Documentation Review
- Key Informant Interviews

5.1 Literature and Documentation Review

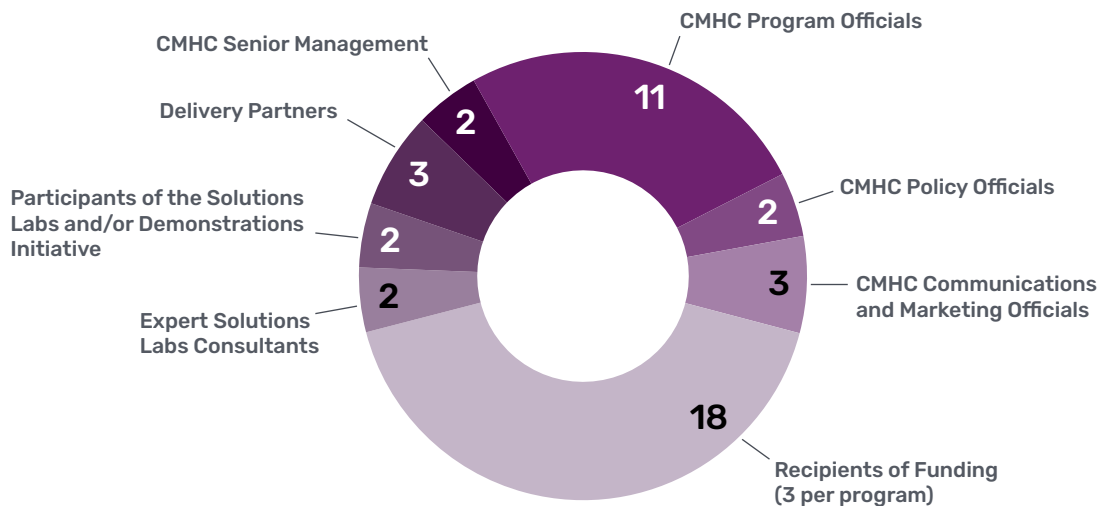
A detailed review of the key background documents, external literature, program documents, and program data was conducted to address evaluation question related to relevance and performance. This line of evidence also provided contextual information on the history and objectives of the RDI programs scope and delivery mechanisms, as well as any shifts or changes that have occurred.

5.2 Key Informant Interviews

The evaluation team used in-depth interviews, via open-ended questions, to gain information related to the evaluation questions. To optimize the efficiency and effectiveness of the interviews, a purposive sampling methodology was used.² The evaluation's sample was provided by the RDI program leads team and was considered by the evaluation team in addition to factors of project materiality, regional distribution, and program components to select interviewees. Using a purposive sample ensured that the evaluation team invited a maximum variation of key informants in order to gain as much insight as possible to inform this evaluation. Interviews were conducted with 43 key informants as indicated in Figure 1.

² A purposive sample is a nonprobability based sample whose objective is to produce a sample that can be logically assumed to be representative of the population.

Figure 1: Number of Informants per Type of Key Internal and External Informants



For more details relating to the evaluation methodology, including the application of the methodologies to the evaluation questions, limitations, and quality assurance practises, see [Annex F: Evaluation Methodology and Quality Assurance](#).

6 Evaluation Findings

6.1 Evaluation Question 1: Is there a continued need to enhance expertise and capacity in the housing sector?

Finding 1

There continues to be a significant need to enhance expertise and capacity in Canada’s housing sector in order to provide sufficient and adequate housing research and innovation to inform decision and policy making.

Homelessness and a lack of affordable housing supply continue to be significant challenges in Canada (Canadian Alliance to End Homelessness et al., 2019). As of 2018, over 1.6 million Canadian households (both rental and owned) live in core housing need (Statistics Canada, 2020). The number of renters in core housing need³ has continued to grow over the period of 1991 to 2016 with approximately 1.12 million renter households were in core housing need in 2016 (at the time of the last census) (Pomeroy & Lampert, 2017). The number of individuals on community housing waitlists has increased exponentially over the past 11 years (Federation of Canadian Municipalities, 2016). In 2019, the average Canadian household was allocating 51.3% of household income to mortgage payments (Hogue, 2019) and it was estimated that 235,000 Canadians experienced homelessness (Gaetz et al., 2016). Housing inequality continues to disproportionately affect Indigenous populations (Canadian Alliance to End Homelessness

³ A household is considered in “core housing need” if it does not meet one or more of CMHC’s adequacy, suitability or affordability standards, and would have to spend 30% or more of its before-tax income to access acceptable local housing. For more information on this definition see [Annex B: Key Definitions](#).

et al. 2019), with shelter use among Indigenous people being 10 times higher than among non-Indigenous people (Federation of Canadian Municipalities, 2016). Evaluation interviewees confirmed that additional research is required to better understand the intricacies of these challenges, to inform decision-making at all levels of government, and to design and deliver programming (including housing regulations and housing standards) aimed at addressing the needs of vulnerable populations. Reviewed documents and literature also confirmed the continued need for research and demonstration initiatives such as those supported by the evaluated RDI programs. As highlighted in CMHC's *"What We Heard: Shaping Canada's National Housing Strategy"* report, current data and research about vulnerable populations and their housing needs lack the necessary depth and comprehensiveness to fully inform housing policy design and strategy.

Specifically regarding vulnerable populations, interviewees noted a lack of data available that is specific to various Indigenous contexts, including northern, off-reserve, on-reserve, and urban Indigenous housing as well as how treaty agreements affect Indigenous housing. Literature and documentation reviewed also suggested that there is a lack of understanding of Indigenous cultural contexts and ways of life and how those factors affect housing for Indigenous populations (Conference Board of Canada, 2016). To address these gaps, the evaluated RDI programs are able to tailor their open call competitions or communications materials to encourage applications targeted at the Indigenous Housing Priority Area.

In addition to gaps in research, several interviewees noted limitations with regard to the research capacity of Canada's housing sector. They perceived Canada as having less housing research capacity than Australia or the United Kingdom. One interviewee noted the need to travel to housing research conferences in Australia, the United Kingdom, and Scandinavia because the housing research conferences held in Canada do not currently have the capacity to facilitate valuable connections between researchers to the same extent

facilitated abroad. Moreover, several interviewees reported that there are a limited number of policy groups or think tanks that are solely or primarily dedicated to advancing housing research in Canada and that the housing research that is being conducted in Canada is done in only a few places, and is often focused in the largest urban centres.

Interviewees also mentioned that there is a continued need to facilitate capacity building for organizations within the Canadian housing sector. They noted that community-based organizations are well placed to represent vulnerable populations due to their understanding of the needs of the housing sector and extensive experience working with these populations. However, these organizations were perceived as having limited capacity and resources. The funding dedicated to the evaluated RDI programs helps fill this gap as it addresses the need of community-based organizations for housing expertise and capacity by funding solutions developed by these organizations so that they can adequately address the needs of the housing sector. In addition, the evaluated RDI programs such as the ***Collaborative Housing Research Network*** help build this capacity within the housing research sector in Canada by providing a central point of connection for housing researchers throughout the country. Interviewees noted that these networks require continued support and nurturing in order to continue to grow. They suggested that in order to more effectively meet the challenges of Canada's housing sector in a timely manner and support informed decision-making at all levels of government, there is a need to enhance housing research and capacity, develop innovative solutions, and create a stronger network of housing stakeholders with an interest in housing research.

Finally, key informants noted that CMHC has received more applications for all six evaluated RDI programs that meet the threshold for funding than CMHC is able to fund. This is an indicator of the demand and need for continued funding for housing research.

Finding 2

The evaluated RDI programs do not duplicate existing research- and innovation-based programs and together provide support and opportunities for a wide range of housing stakeholders to enhance housing research and innovation and capacity.

While there are a number of incubators and accelerators that encourage innovation, and the tri-council agencies (CIHR, SSCHR, and NSERC) have long-standing programs that support research within Canada, there are no initiatives or programs similar to the evaluated components of the RDI that specifically support housing research and innovation on a national scale.

Interviews with program recipients of all six RDI programs confirmed that the suite of RDI programs does not duplicate other similar initiatives and programs in Canada. However, certain aspects of the evaluated RDI programs may complement existing programs such as BC Housing's Building Excellence Research and Education Grants and SSHRC's Insight Development Grants. The **Housing Research Scholarship Program**, for example, is similar to the existing tri-council fellowship programs as it also aims to build the pool and enhance the capacity of postdoctoral, early-career researchers while advancing research and knowledge in specific areas (e.g., health research, social sciences, etc.). Some interviewees also noted that there may have been opportunities for them to access more general research and innovation funding (not specific to the housing sector) through organizations such as the Michael Smith Foundation for Health Research, the Centre for Education Research and Innovation (CERI), or any of the tri-council agencies.

Each evaluated RDI program focuses on housing and fills a unique gap related to enhancing housing research and capacity in relation to the National Housing Strategy and its priority areas and priority vulnerable populations. In this way, the RDI is able to support an entire spectrum of stakeholders within the housing sector to enhance housing research and capacity in Canada. By supporting academics through the **Housing Research Awards Program** and the **Housing Research Scholarship Program**, CMHC is advancing areas of

housing research, supporting the development of a strong foundation for housing research in Canada, and bringing increased awareness to the research that is being conducted. The **Research and Planning Fund** offers a similar type of support for community organizations. The **Solutions Labs** and **Demonstrations Initiative** encourage community organizations, housing developers, and other stakeholders to create innovative solutions to address housing challenges while also encouraging the dissemination of those solutions in order to scale the acceptance of promising practices. Finally, the **Collaborative Housing Research Network** contributes to knowledge generation, dissemination, and capacity building for housing researchers in Canada.

6.2 Evaluation Question 2: Are the objectives of the RDI programs consistent with federal government and CMHC priorities?

Finding 3

The objectives of the evaluated RDI programs are consistent and well aligned with federal government and CMHC priorities.

The evaluation's review of documentation found that the evaluated RDI programs are in aligned with federal government strategies, plans, and priorities. In the 2019 National Housing Strategy Act, the Government of Canada recognized in legislation the fundamental right to housing for Canadians (National Housing Strategy Act, 2019). The NHS is emphasized in the 2019 Mandate Letter for the Minister of Families, Children and Social Development (Prime Minister of Canada, 2019). The 2019 and 2020 Speeches from the Throne (Privy Council Office, 2019) also highlighted the need for increased affordable housing for Canadians (Governor General of Canada, 2019). The Government of Canada has committed to reducing chronic homelessness and providing every Canadian with a home (CMHC, 2019b). As emphasized in NHS consultations, stakeholders noted that, in addition to expanding the housing supply in Canada, there is a need to collect adequate housing-related data and research to inform decision-making and policymaking

and reduce the reliance on the federal government as a main source for housing-related data (Conference Board of Canada, 2016). This need is more apparent due to the COVID-19 pandemic.

CMHC's aspirational goal is that by 2030, everyone in Canada has a home that they can afford and that meets their needs. Supporting research, capacity-building, and innovation is necessary for the effective delivery of the NHS and will allow CMHC to adjust the strategy as the Corporation gains a better understanding of the outcomes that are being achieved and the needs of Canadians, including those in priority groups.

In order to achieve its aspirational goal, CMHC set out three strategic objectives in its 2021 – 2025 Corporate Plan. The evaluation's review of CMHC's website and corporate plan found that the evaluated RDI programs are directly aligned with all three objectives.

- **Understand needs of Canadians who are vulnerable.** The needs of vulnerable Canadians are diverse and data collection and research is required to understand these needs in order to develop effective solutions.
- **Experiment with new ideas.** Innovative housing solutions are required in order to effectively meet the needs of Canadians and meet CMHC's 2030 aspiration.
- **Publicize housing data and insights.** Funded projects of the evaluated RDI programs increase the diversity of housing data sources and research available within NHS priority areas to inform decision-making. The publication and promotion of this information through knowledge transfer activities by both CMHC and recipients is key to promoting long-term affordability and sustainability.

In addition to the documents reviewed, key informants also noted that there is alignment between the federal government's priorities and the overall objectives of the RDI.

Finding 4

The evaluated RDI programs are progressively ensuring adequate coverage of the NHS priority areas. With continued work in this area, the evaluated RDI programs are expected to provide adequate coverage of the NHS priority areas in future years.

All recipients interviewed for the purpose of this evaluation noted that their research or project was aligned with one or more of the NHS priority areas, particularly Housing for Those in Greatest Need, Balanced Supply of Housing, and Community Housing Sustainability. This alignment with NHS priority areas is built into the design of the evaluation RDI programs. Reviewed documentation demonstrated that the evaluated RDI programs are tracking the NHS priority areas and vulnerable populations that each funded project supports. Key informants expressed an expectation that with the passage of time, there will be complete coverage of all NHS priority areas over the next eight years of the RDI.

If CMHC identifies any gaps in terms of the coverage of NHS priority areas, the *Demonstrations Initiative*, *Solutions Labs*, and the *Research and Planning Fund* can tailor open call competitions every year to encourage applications targeted at a specific Priority Area. The *Housing Research Scholarship Program* and *Housing Research Awards Program* also possess this flexibility to a certain extent because CMHC is able to tailor its communications materials and encourage applications that directly address a specific NHS Priority Area. Because the *Collaborative Housing Research Network* is a one-time funding initiative, the program does not possess this type of flexibility. The ability to tailor calls for proposal is beneficial as it provides the flexibility needed to adapt the program to support in-demand housing sector research and new areas of interest. Key informants noted that there may be an opportunity for additional coordination across evaluated RDI programs in order to identify potential gaps in the coverage of NHS priority areas, and to tailor future open call competitions to specific NHS priority areas that may be lacking coverage.

Interviewees and the evaluation's review of documentation noted that in 2020, the **Research and Planning Fund** utilized the ability to tailor the Calls for Applications to prioritized funding eligible projects that address priority areas for which fewer proposals had been received in previous calls. This tailored call prioritized funding projects that addressed racialized persons or communities, survivors fleeing situations of family violence, the LGBTQ2+ community, Indigenous peoples, veterans, and those experiencing mental health challenges. The results of this tailored call and the potential for heightened uptake in these priority areas were not known at the time of this evaluation.

6.3 Evaluation Question 3: To what extent have the RDI programs contributed to the achievement of intended results of the National Housing Strategy?

Finding 5

There is a significant amount of work underway supported by the evaluated RDI programs that will become available to contribute to knowledge, technical capacity, and research capacity in the housing sector and support informed decision making over the next several years.

Based on documentation reviewed including progress reports, final reports, and internal tracking sheets, the evaluation team identified 50 unique innovative solutions that address challenges within Canada's housing sector and NHS priority areas supported through the **Demonstrations Initiative**, **Housing Research Awards Program**, **Research and Planning Fund**, and the **Solutions Labs** program between 2018 and 2019.

According to documentation reviewed including project charters, published project profiles, and internal tracking tools, the evaluation team identified over 100 knowledge

transfer activities that were completed since 2018 as part of the **Demonstrations Initiative**, the **Housing Research Awards Program**, and the **Research and Planning Fund**. These knowledge transfer activities included: project profiles, external media, conferences, toolkits, videos, workshops, and other products that were able to disseminate information addressing the NHS priority areas. It is important to note that this number is not reflective of all the activities completed across all six RDI programs.⁴

It is likely that more than 100 knowledge transfer activities have been completed across all six RDI programs since 2018. Key informant interviews noted that knowledge transfer activities were performed for all six evaluated RDI programs. For example, interviewed CMHC Program Officials cited approximately 100-150 different activities conducted through **Solutions Labs**. Additionally, most interviewees were able to describe the types of knowledge transfer activities and products that were created, but not estimate a specific number of activities or products. Examples of these activities mentioned by interviewees include presentations, published reports, networking events, and face-to-face community engagement.

Key informants noted that CMHC's ability to effectively track knowledge mobilization efforts and report on program outcomes is limited at this time due to limited financial and human resources. For example, data on activities conducted by **Research and Planning Fund** was available, however, the evaluation team identified limited documentary evidence of the number and type of knowledge transfer activities conducted by the recipients themselves.⁵ Being aware of these activities will ensure that CMHC-led knowledge transfer activities enhance and compliment those conducted by recipients, as well as contribute to the measurement of short and long term impacts of the evaluated RDI programs.

Research can take years to be completed after the funding support has begun. As per key informants of the **Housing Research Scholarship Program**, the **Research and Planning Fund**, and **Solutions Labs**, they have received the funding and support necessary to

⁴ The evaluation team did not identify any documentary evidence that would inform how many knowledge transfer activities were conducted by the *Collaborative Housing Research Network*, the *Housing Research Scholarship Program*, or the *Solutions Labs* program.

⁵ The evaluation team noted that there will be a formal reporting and tracking system in place to track knowledge products and knowledge transfer activities for the *Solutions Labs*.

begin their activities, but have not reported on tangible outcomes due to their projects still being underway. In addition, the evaluation's document review and interviews noted that the COVID-19 pandemic has delayed many program recipients' ability to either execute their projects or initiatives or report on their respective research project outcomes. Interviews noted that both of these factors have impacted the extent to which reliable housing research information has been made available in a timely manner to support informed decision making and the extent to which knowledge, and technical and research capacity has been enhanced within the housing sector.

Despite these delays, the perception of the evaluated RDI programs' ability to build capacity is positive. Interviewed recipients stated that their initiatives would not have been possible without the support from the evaluated RDI programs. Some recipients have stated that without the funding, they would not have the capacity to perform this work at all. At the time of the review, all evaluated RDI components were up-and-running and various research projects, demonstrations, **Solutions Labs**, awards, and post-doctoral fellowships are underway.

All of the evaluated RDI programs are on track to meet their objectives and are expected to contribute to knowledge and capacity in the housing sector and inform decision making over time. Some CMHC Program Officials noted that knowledge transfer activities cannot be completed until projects are completed and all outcomes have been achieved. As such, the evaluation team expects that as the projects develop and are completed there will be an increase of the knowledge, technical, and research capacity within the housing sector.

Finding 6

The evaluated RDI programs contribute to improved awareness, knowledge, and acceptance of promising innovation by funding and supporting program recipients and participants to conduct research, form collaborative networks, and develop innovative solutions for housing problems.

The evaluation's review of documents and interview data indicated that the six evaluated RDI programs are starting to make contributions to improved awareness, knowledge and acceptance of promising innovations by influencing decision and policy making within government and other housing-related organizations.

The **Collaborative Housing Research Network** has informed stakeholders of innovation and research emerging from the program. For example, housing sector stakeholders were engaged through an Affordable Housing Roundtable, where information was utilized for research and decision making. However, both CMHC Program Officials and **Collaborative Housing Research Network** recipients acknowledge that, due to COVID-19 and the Network's recent creation, there is little available data to show the capacity of the **Collaborative Housing Research Network** to contribute to improved awareness, knowledge and acceptance of promising innovation. Within the next few years, tangible results are anticipated as the **Collaborative Housing Research Network's** Hub and Research Teams advance their respective areas of research and knowledge mobilization activities.

The **Housing Research Awards Program** provided award recipients with the opportunity and platform to disseminate and mobilize knowledge, such as speaking engagements at national housing conferences, deploying research methodology from a project to four other communities; and engaging housing sector stakeholders to participate in housing research. Additionally, multiple **Housing Research Awards Program** recipients recalled the prestige that their relationship with CMHC provided to their projects which allowed them the opportunity to raise awareness of housing research innovation. For example, one recipient was engaged as a speaker at a national housing conference to speak about the innovations within their project. His presentation was attended by CMHC decision-makers and subsequently influenced the addition of youth as an NHS Priority Population.

All interviewed **Demonstrations Initiative** recipients credited the initiative with providing their projects with the ability to contribute to improved awareness, knowledge and acceptance of promising innovations within the housing sector. This was accomplished through targeted knowledge mobilization activities from recipients to housing sector stakeholders concerning the development of affordable housing

models and inclusive development models such as community solutions for individuals who are disproportionately affected within the housing sector. For example, a **Demonstrations Initiative** project showcased the use of modular construction for sustainable affordable housing by providing insights on their practices through webinars, technical bulletins, and tours of the housing projects (CMHC, 2019a). A different **Demonstrations Initiative** project contributed to provincial building code regulations amendments. A provincial housing agency leveraged the research conducted by this project on moisture management in buildings and incentive programs for sustainable utilities to inform amendments to provincial building code regulations. Another **Demonstrations Initiative** project's compiled best practices for planning high-quality affordable housing and disseminated this knowledge to housing developers.

Solutions Labs is also contributing to knowledge mobilization and improved awareness of housing research and innovation. For example, the **Solution Labs** funded Eva's Initiative with Doblin Canada which mapped the journey into and out of homelessness of racialized youth in the Toronto area to assess the barriers to finding and remaining in housing for these individuals. It informed policy changes for youth experiencing homelessness in Canada and for individuals who receive Registered Disability Savings Plan benefits and are searching for housing. This initiative received recognition for being a highly innovative solution for North American housing challenges. Ongoing research supported by **Solutions Labs** continues to adapt to the new concerns that emerge within the housing sector. One recipient noted that as a result of the COVID-19 pandemic, retrofit work and ventilation improvement is now more important than ever to implement in housing throughout the country. This speaks to the RDI's ability to continue supporting new innovative solutions to address new housing challenges on a forward-looking basis.

Solutions Labs projects work with expert consultants who have expertise in innovative problem solving approaches. They provide advice on Lab design and methodology, deliver technical innovation aspects for Lab activities, and assist in reporting (CMHC, 2020b). Interviewed expert consultants credited **Solutions Labs** with facilitating the dissemination of knowledge regarding opportunities to address housing issues,

promoting diverse methods of addressing these challenges, and creating solutions for the housing sector. For example, some Labs explore the barriers to accessing housing faced by priority populations throughout Canada and their underlying cause.

CMHC has enabled knowledge sharing by creating and promoting a community of researchers and innovators within both the **Solutions Labs** and the **Demonstrations Initiative** through the RDI's Expert Community on Housing (ECOH) platform. The ECOH Platform is a virtual community created to share housing knowledge and contribute to the development of housing solutions by allowing housing experts to discuss, connect, and work together on a variety of housing issues and topics. Recipients recalled that a beneficial aspect of their involvement with these two programs was the ability to create and implement tangible solutions to housing challenges faced by those in the greatest need.

Interviewees noted that the **Housing Research Scholarship Program** and the **Research and Planning Fund** are also contributing to knowledge mobilization and improved awareness of housing research and innovation.

The impact of the evaluated RDI programs on improved awareness, knowledge and acceptance of promising innovation is trending positively. As projects are completed and as the results of completed projects are effectively communicated and disseminated to stakeholders and individuals within the housing sector, this impact is expected to grow.

Finding 7

The evaluated RDI programs are enabling the facilitation of partnerships and have contributed to the formation of partnerships and collaborative arrangements.

The evaluated RDI programs have contributed to the formation of partnerships and collaborative arrangements. See Table 3: Documented Number and Types of Partnerships Formed per Evaluated RDI Program for the number and types of partnerships from the launch of the RDI in 2018 to September 30, 2020.

Table 3: Documented Number and Types of Partnerships Formed per Evaluated RDI Program

RDI Program	Number of Partnerships	Examples
Collaborative Housing Research Network	161	Educational institutions, private non-profit sector organizations, municipal and federal governments, and business enterprises. A further 60 collaborators are referenced, including consultants, academics, public sector employees, non-profit employees, and medical experts.
Demonstrations Initiative	43	Academic institutions, community groups, building councils, non-profit organizations, research institutions, communications organizations, and housing providers.
Housing Research Awards Program	13	Educational institutions, municipalities, non-profit organizations, First Nations, and an Assembly of Provincial Chiefs.
Research and Planning Fund	65	Members of the academic, funding, and community sectors.
Solutions Labs	320	Healthcare sector, academic research, private firms, municipal and provincial governments, Indigenous organizations, Indigenous governments, housing providers, community organizations, and the federal government
Housing Research Scholarship Program	N/A	N/A – Facilitation of partnerships is not a requirement nor an objective of this program.

Since the formation and strengthening of partnerships and collaborative arrangements depends on a wide range of factors, it was not possible to attribute the formation of a partnership or collaborative arrangement solely to the RDI. CMHC Program Officials noted that it is difficult to accurately distinguish between partnerships that have been developed as a result of participating in the RDI and partnerships formed prior to, or in anticipation of, involvement in the evaluated RDI programs. While a detailed assessment of the ECOH platform was out of scope for this evaluation, the evaluation team noted that it is being used by some of the evaluated RDI programs as a tool for knowledge mobilization. This facilitates the creation of partnerships by strengthening connections and building partnerships between recipients and other housing stakeholders who have a common interest in housing issues and a common relationship with CMHC. Communicating the existence of this platform to

recipients of CMHC funding support as early as possible will encourage participation on the platform and further facilitate the creation of partnerships.

Multiple recipients noted that they were able to either strengthen an existing partnership or connect with new stakeholders within the housing sector. They stated that the prestige of CMHC awards, the reputation of CMHC being affiliated with their research, and the funding provided by CMHC have all contributed to creating connections and partnerships within their housing research as well as in related fields.⁶

As projects are completed and their respective results are reported, the evaluation team expects that CMHC will have a more thorough understanding of the number and types of partnerships that are being formed throughout the evaluated RDI programs. A mechanism for accurately tracking RDI programs contribution to the formation or strengthening of

⁶ An example of such a related field would be research being conducted in the health and medical sector and the correlations between health and housing measures.

partnerships could benefit CMHC by allowing officials to better understand the impact of the RDI programs in this regard. For example, the **Demonstrations Initiative** plans to collect information via voluntary surveys on partnerships formed at one, three, and five years post-project completion. It may be beneficial to apply this process to all evaluated RDI programs.

Finding 8

The evaluated RDI programs have made a significant contribution towards engaging housing sector stakeholders within the initiative and providing opportunity for recipients to collaborate internally and externally within the housing sector.

The six evaluated RDI programs have facilitated collaboration within the housing sector. The evaluation's documentation review noted the following estimate regarding the number and types of active stakeholders:

- **Collaborative Housing Research Network:** 60 stakeholders including non-profit organizations, municipal governments, public sector employees, academics, health professionals, post-secondary education students, and provincial governments.
- **Demonstrations Initiative:** 1,690 to 1,950 stakeholders across 13 projects. This is based on interim progress reports provided to CMHC. The evaluation team estimates that there are approximately 130 to 150 stakeholders involved with each project.
- **Research and Planning Fund:** 76 stakeholders including community engagement organizations, focus groups of tenants, non-profit organizations, private property owners, Indigenous advisory committees, and First Nations.

- **Solutions Labs:** 2,795 to 3,225 stakeholders across 47 labs. This is based on interim and final progress reports provided to CMHC. The evaluation team estimates that there are approximately 65 to 75 stakeholders engaged per lab.⁷
- **Housing Research Awards Program:** Data was not available on the number of stakeholders engaged for these programs.

CMHC Program Officials also noted that the RDI programs facilitated collaboration, engagement and alignment within the housing sector for individuals and organizations that are funded by CMHC, as well as external parties who conduct research within the housing sector as in related fields. The **Solutions Labs** program in particular enables collaboration within the housing sector by engaging expert consultants who perform duties for the initiative. This engagement enables collaboration between recipients, participants, expert consultants, and other organizations known to any of these parties. Program Officials also have strategic plans for further collaboration and engagement within the housing sector with the intention to engage with educational institutions and alternative organizations, particularly for the **Housing Research Scholarship Program**.

Recipients noted that the publication of knowledge dissemination products via the CMHC website has enabled collaboration within the housing sector. This is especially important amidst the COVID-19 pandemic where face-to-face collaboration is limited. Recipients encouraged the continuation of these publications in future years. The evaluation team expects that the number of stakeholders that are actively engaged throughout CMHC's initiatives will continue to grow over time.

⁷ It should be noted that final reports from the 2018 competition year are still being delivered to CMHC. As a result, information was gathered from final reports that have been previously submitted to CMHC and a total number of stakeholders was estimated by the evaluation team. Only one interim report from the 2019 competition year had been submitted as of September 30, 2020.

6.4 Evaluation Question 4: Are the RDI programs being delivered in an economic and efficient manner?

Finding 9

All of the evaluated RDI programs have successfully and fully allocated their respective program dollars every year to support a total of 117 applicants/projects over the period of 2018-2020.

As indicated in Table 4, the review of documentation outlined the following total budget and expenditure data as of the 2019-20 fiscal year and the following commitment data and number of funded applicants over the period of December 1, 2017, to September 30, 2020, per evaluated RDI program.

Table 4: Documented Total Budget, Expenditure Data, Commitment Data, and Number of Funded Applicants per Evaluated RDI Program

RDI Program	As of March 31, 2020		As of September 30, 2020	
	Total Budget ⁸ (in \$M)	Expenditure Data ⁹ (in \$M)	Commitment Data (in \$M)	Number of Funded Applicants ¹⁰
Collaborative Housing Research Network	13.90	1.59	8.57	8 Partnership Development Grants 6 Partnership Grants
Demonstrations Initiative	12.50	1.65	2.24	17
Housing Research Awards Program	0.50	0.09	0.09	10
Housing Research Scholarship program	3.65	0.23	0.77 ¹¹	16
Solutions Labs	24.50	3.43	9.95	47
Research and Planning Fund	6.60	1.22	2.33	19
Total	61.65	8.21	23.95	117

⁸ Total budget over ten years.

⁹ These figures are without operations and maintenance/administrative costs.

¹⁰ It is important to note that the number of funded applicants varies by program due to a number of factors including program authorities, project type and cost, and level of funding per program.

¹¹ This is the total dollar amount of active contracts between RDI and the recipients. These contracts were entered into in 2019 and the funding is committed over a 5-year period.

Finding 10

The application process is highly competitive as evaluated RDI programs have consistently received a higher number of applications every year than they are able to fund. It is expected that the levels of awareness of these programs will increase as the initiative matures.

Key informant interviews noted that the initiative as a whole has successfully launched their programs and are continuously receiving applications. In addition, the initiative is successfully targeting the right audiences and generating adequate leads to effectively administer RDI funding.

Evaluated RDI program recipients noted that they often found out about the evaluated RDI programs through their own professional networks or through an existing contact at CMHC, including through CMHC's newsletters and mailing lists. While this method of awareness-building has been quite successful to date, some interviewees suggested that there may be an opportunity for CMHC to build a more robust communications and marketing strategy in order to increase awareness of the programs, especially in response to an increasingly virtual world due to the COVID-19 pandemic. For example, interviews with CMHC Program Officials of the **Research and Planning Fund** noted that there are very few, if any, applications from organizations who work with racialized groups, veterans, and women fleeing violence. Interviewees noted that this may be because these organizations are not aware of these programs. It may also be because many of the organizations who are working with these priority populations are on the front lines and do not necessarily possess the time and capacity to plan or develop research ideas.

Interviewees also noted that the evaluated RDI programs would benefit from increased applications from:

- smaller organizations;
- geographically diverse areas outside of urban centres (particularly in First Nations and with Indigenous housing organizations);
- racialized communities;
- northern communities;
- francophone researchers or groups;
- other stakeholders within the housing sector, including academic institutions (e.g., universities) who may have additional capacity to support community organizations during the application process; and,
- municipalities and other organizations that could benefit from housing research and solutions.

Although some evaluated RDI programs may not be well known within certain networks, interviewees noted that the initiative as a whole is still in its early stages and expect that the levels of awareness of these programs will increase as the initiative matures and results are disseminated through CMHC's existing promotion channels¹² and through the publication activities of researchers.

Finding 11

The suite of evaluated RDI programs are perceived as being delivered in an economic and efficient manner; the team of full-time equivalent (FTE) resources dedicated to the administration and delivery of these programs is perceived as operating on a very lean basis. Partnering with the tri-agencies has worked well and perceived to have operated in an economical and efficient manner.

Documentation review noted the estimated FTE breakdown for evaluated RDI programs, excluding overhead, as of December 2020, as indicated in Table 5.

¹² CMHC's existing promotion channels include its website, newsletters, social media, events, and word-of-mouth.

Table 5: Estimated Annual FTE Breakdown per Evaluated RDI Program

RDI Program	Annual FTE Estimated Budget Breakdown
Demonstrations Initiative	1.84 FTE
Solutions Labs	2.13 FTE
Housing Research Awards Program	1.29 FTE
Collaborative Housing Research Network	0.84 FTE
Housing Research Scholarship Program	0.37 FTE
Research and Planning Fund	1.00 FTE

CMHC Interviewees noted that the **Demonstrations Initiative** was launched smoothly. However, they also mentioned a need to conduct an in-depth analysis regarding differences in efficiencies between the mechanisms (e.g., call for proposals, targeted demonstrations) by which funded projects can be identified. This analysis would help maximize the impact and outcomes of the **Demonstrations Initiative** by informing CMHC which mechanisms are the most efficient at achieving the desired outcomes. Interviewees reported having insufficient programming or operational supports to deploy all mechanisms at once.

CMHC Interviewees noted that the program budget and the FTE resources available for the program delivery team for the **Solutions Labs** are adequate to administer the program. Their main challenge is to perform knowledge mobilization activities needed to achieve the RDI's expected outcomes with the resources at their disposal.

CMHC Interviewees noted that the program budget and the FTE resources available for the program delivery team for the **Housing Research Awards Program** are adequate. No challenges related to economy or efficiency were noted.

CMHC Interviewees noted that overall, there are sufficient administrative resources in place to support the delivery and activities of the **Collaborative Housing Research Network**. Since the **Collaborative Housing Research Network** is administered in partnership with SSHRC, significant efficiencies are gained. The framework of the SSHRC Partnership Development Grants is already well established and many administrative aspects are already developed. The SSHRC Partnership Development Grant structure is well aligned with the needs of CMHC.

The **Housing Research Scholarship Program** is able to benefit from significant administrative efficiencies because the program is delivered in partnership with the tri-council agencies and leverages their existing fellowship program infrastructure. The bulk of the administration of the program is external to CMHC, including the application review processes. CMHC is able to benefit from a well-known, long-standing program that is already prestigious and competitive. CMHC Program Officials noted that they appreciate the high level of efficiency and the savings that have been achieved related to the administration of this program (compared to CMHC designing and delivering a similar type of program on its own).

The **Research and Planning Fund** is successfully allocating program dollars to maximize the number of projects CMHC is supporting. CMHC interviewees noted it can be challenging to effectively track **Research and Planning Fund** project outcomes and results because the program has limited resource capacity. CMHC Program Officials noted that they are working on improving how to manage the program budget across fiscal years and effectively allocate program dollars towards multi-year research projects. Program Officials noted that they consistently receive applications that score a minimum of eighty percent, and the number of applications that meet this threshold is greater than the number of projects that the **Research and Planning Fund** is able to fund. Given this low applicant success rate, CMHC Program Officials have made adjustments to the application process to reduce application burden. They are satisfied with how the application evaluation process has been carried out thus far because it is perceived as being a defensible system and the highly competitive nature of the **Research and Planning Fund** is perceived to have produced quality results.

Recipients of CMHC funding are also often receiving funding from multiple sources or funding programs within CMHC. CMHC Program Officials have reported that it can be challenging to have a complete understanding of all the different funding sources an individual or organization is receiving from various CMHC programs. Having better visibility on the various CMHC funding streams an organization is benefitting from can provide an opportunity for the six evaluated RDI programs to collaborate, achieve efficiencies, and allow the RDI to reach its full potential.

CMHC interviewees noted some potential areas for improvement related to the application portal that is used by some of the programs. For example, some applicants mentioned that the application portal did not always function properly and as expected when trying to submit forms or supporting documentation. CMHC interviewees also noted that it has caused some administrative challenges when attempting to track relevant information and documents from their applicants. As such, there may be an opportunity for the program teams to explore how to leverage existing infrastructure that more suitably meets their needs with regards to collecting and tracking information.

Recipients noted that while they are satisfied with the delivery of the evaluated RDI programs, there are few areas for improvement. One interviewee noted that it may be beneficial for CMHC to be clearer about expectations with regards to the level of involvement expected of a recipient (e.g., reporting requirements or the requirement to attend meetings). Another interviewee noted that it may also be beneficial for CMHC to be clearer about expectations with regards to the information required for knowledge transfer products, such as the project profiles that are published to the CMHC website.

Finding 12

Knowledge mobilization and dissemination activities remain an area for improvement.

Interviewees noted that in order to maximize outcomes of the RDI, additional support and resources for knowledge mobilization may be required to enhance knowledge transfer activities in order to amplify the research and innovations that are being developed through the evaluated RDI programs.

CMHC's website describes the goals and components of the RDI and the progress to date in terms of implementing these components and performs general promotion for the six evaluation RDI programs. CMHC also issues news releases to announce funded program applicants with supporting backgrounders that briefly described their projects and what they aimed to achieve. CMHC has also published project profiles for some completed projects.¹³ At the time of the evaluation, CMHC had completed and published a relatively small number of project profiles. It is worthwhile for each component to have a schedule for the production of a more complete set of project profiles that have the potential to be beneficial to stakeholders interested in ongoing housing research or in replicating innovative housing solutions. Since this does not exist at this relatively early point in time (year three of a ten year initiative), RDI Program Officials indicated that they have not completed as much as they would have liked with regard to the sharing of timely and relevant housing research information. The evaluation team noted that CMHC has initiated a plan to clear the backlog of project profiles to be published and is on track to publish all of these profiles prior the end of June 2021.

¹³ To see the central repository of NHS project profiles, go to <https://www.cmhc-schl.gc.ca/en/nhs/nhs-project-profiles#sort=relevancy>.

Key informant interviews noted that there are limited resources available to support the broader knowledge mobilization activities the RDI programs require to amplify the impact of supported projects. These activities include case studies, presentations on outputs, and downloaded content in the Housing Knowledge Centre. Resourcing for these activities within CMHC is perceived as limited because CMHC communication resources are not dedicated to any specific program or initiative within CMHC; rather the allocation of communication resources is driven by corporate priorities as a whole. In this manner, communications resources tend to support knowledge mobilization activities for research and innovation activities that have been completed, rather than for the dissemination of planned activities or interim results. Where possible, interim results and descriptions of work underway for supported RDI projects are communicated through the CMHC NHS websites. The evaluation acknowledges that knowledge transfer and dissemination is a responsibility shared by several sectors and teams within CMHC.

For the **Demonstrations Initiative** in particular, it is a program requirement that funded projects be profiled by CMHC while they are underway. Interviews noted that this requirement has not been met in the initial years of program implementation, and there is no CMHC-based platform to highlight supported innovations. For a program like the **Demonstrations Initiative**, reporting interim results is important so that there is continuous knowledge sharing, collaboration, and increased knowledge of successful innovations. Reporting on interim results would enable all the evaluated RDI programs to demonstrate their progress towards longer term outcomes, make housing data and information available to support decision making in a timely fashion, and facilitate connections or partnerships among housing sector stakeholders to discuss and collaborate on ongoing work. For example, one stakeholder may learn about ongoing research by another stakeholder and if areas of interest overlap, they may decide to build a partnership and work together towards a common goal. Overall, reporting interim and final results also supports the objectives of the six evaluated RDI programs to build capacity within the housing sector. There are ongoing efforts to address these gaps within CMHC, such as developing a central repository on the CMHC website to highlight NHS project profiles.

The current reporting infrastructure, including the publication of project profiles on the CMHC website and the ECOH Platform, can be leveraged to support knowledge mobilization activities and allow CMHC to more effectively maximize the impact and outcomes of its funded projects. As projects are completed over the next several years, the reporting infrastructure is in place to disseminate the results of these projects. There are ongoing efforts to make better linkages between the project profiles published on the CMHC website and the stories of Canadians (who have benefitted from a specific RDI project) published on the Place to Call Home website.

Interviewees noted that if financial and human resources are allocated for additional knowledge mobilization initiatives to be undertaken, the six evaluated RDI programs could more effectively enhance and amplify the knowledge transfer and dissemination activities that are already being conducted by program funding recipients. If financial and human resources are not allocated for additional knowledge mobilization initiatives, then the existing reporting infrastructure provides an adequate foundation to report interim and final results once the projects have had time to complete more of the planned work.

6.5 Evaluation Question 5: Are there more economic or efficient ways to design the RDI programs?

Finding 13

The suite of evaluated RDI programs demonstrates several strengths with regards to program design, including the use of a review panel to assess applications and using CMHC's housing sector network to increase awareness of the evaluated RDI programs. Partnering with the tri-agencies for the delivery of two RDI programs has worked well and contributed to economy and efficiency.

Interviewees confirmed that the use of a review panel of internal or external reviewers to assess applications allows CMHC to maintain impartiality in the review process and high standards for the projects they choose to fund. Interviews perceived that evaluated programs

are receiving high quality applications as many meet the minimum evaluation criteria thresholds. Most recipients confirmed that the application process of the evaluated RDI programs was relatively straightforward to complete. Many recipients also commended the level of engagement and support offered to them by CMHC Program Officials throughout the application process and after receiving funding.

Another significant strength of the suite of evaluated RDI programs is that they support a wide variety of stakeholders, all at various stages of the research and innovation “pipeline”. For example, the **Housing Research Awards Program** and **Scholarship Programs** support academics building the foundation of housing research within Canada, while the **Research and Planning Fund** performs a similar function for community organizations. The **Demonstrations Initiative** and **Solutions Labs** programs support community organizations, housing developers, and others in creating innovative solutions to address housing challenges while also encouraging widespread knowledge transfer and mobilization. The **Collaborative Housing Research Network** brings a wide variety of housing stakeholders together in order to share knowledge and amplify the research being conducted.

Key informant interviews confirmed that CMHC possesses a valuable network of contacts within the housing sector. This is a strength of the RDI as it allows the evaluated RDI programs to be widely promoted to CMHC’s existing network. There is also an opportunity to further leverage this network in order to enhance the knowledge mobilization activities that are already being conducted by RDI funding recipients.

The evaluation noted that CMHC is able to benefit from significant administrative efficiencies because the **Housing Research Scholarship Program** and the **Collaborative Housing Research Network** are delivered in partnership with the tri-council agencies. Because the programs are administered through the tri-council agencies, CMHC has a smaller element of control over the Corporation’s branding associated with the programs. The implication of this may include a lack of awareness among applicants that CMHC is a partner for these programs. However, the benefits and efficiencies gained through these partnerships greatly outweighs any challenges related to branding.

Key informant interviews noted that there are elements of the design of the program that can be improved in order to benefit the program’s delivery. Recipients of the evaluated RDI programs suggested that CMHC invest in research earlier in the education timeline, namely at the PhD level. This would allow CMHC to engage housing sector researchers earlier in their careers and incorporate doctoral students into the housing sector research community earlier on. An example that was provided by a recipient included developing an award or scholarship for research conducted at the doctoral level.

While the various calls for proposals have been successful in attracting qualified applications, some CMHC Program Officials perceived a potential risk of inadequate uptake of applications in future years. In order to mitigate this risk, key informants suggested building awareness of the program and the supports that are offered throughout the housing sector. As previously mentioned, the evaluated RDI programs may benefit from increased awareness within a variety of groups such as smaller organizations, racialized, northern, or indigenous communities, and francophone researchers. To increase applications within priority areas and from smaller organizations, applicants would benefit from more support in the proposal writing process as they do not often have the resources or the capacity to seek professional proposal writing assistance nor do they typically have internal resources who are well-versed in proposal writing. However, the evaluated RDI programs may not have dedicated program funding to provide support for proposal writing. Another practice to consider would be to promote and increase the awareness of the evaluated RDI programs by leveraging the networks of organizations already aware of these programs. Program Officials have also expressed that a survey on awareness of the program could be beneficial to provide CMHC with information on who in the housing sector is aware of the programs and where promotion would be best targeted. The **Research and Planning Fund** has experienced the opposite risk whereby applications that have met the minimum requirements have not been funded due to the limited funding available. Over time, as research capacity in the housing sector grows, the likelihood of inadequate uptake of available research funds is reduced.

Key informants discussed the platform for virtual communication that has emerged out of the COVID-19 pandemic. Interviewees encourage continued support for the facilitation of virtual connections and collaborations in light of the restrictions on face-to-face interaction. Interviewees suggested that the program could benefit from more exposure on social media and in newsletters published by alike organizations, such as provincial non-profit housing associations and housing research bodies.

Expert consultants have made a significant contribution to the work of individual **Solutions Labs**. Applicants are required to find and work with an expert **Solutions Labs** consultant to apply, design, and deliver each **Solutions Labs** project. CMHC prepared a list of **Solutions Labs** consultants to assist applicants in their search for an appropriate consultant. During interviews, expert consultants suggested that collaboration with recipients and participants could be improved by providing more information about the specific areas of interest or expertise of each listed consultant to facilitate the selection by applicants of an expert consultant who is most aligned to their specific interests.

Finally, CMHC Program Officials noted that the application portal that is currently used by some of the evaluated programs under the RDI is not meeting some of the specific needs of these programs, such as being able to effectively track the documentation submitted by applicants. A few interviews suggested that amendments to the application portal or the application process could help to improve the set of RDI programs that utilize this portal.

Finding 14

Performance indicators for the evaluated RDI programs have been developed, but the required infrastructure to facilitate the data collection is not yet in place.

Documentation clearly outlines the performance measurement practises that are in place for all evaluated RDI programs. Performance Measurement Process (PuMP) indicators are aligned with the expected results and outcomes of the evaluated RDI programs

and are broken down into program outcomes and indicators. Data sources, data collection methods, and baseline data that inform program outcomes are all recorded. Additionally, where possible, the target number of activities to be carried out and the frequency in which data collection will occur is indicated.

A CMHC Working Group has been working to develop a universal set of indicators. This Working Group is composed of the CMHC Policy Measurement and Analysis team, CMHC Business Planning and Reporting team, and the CMHC RDI Program Officials. Policy Measurement and Analysis has been involved with these teams to develop performance indicators at a high-level, with Program Officials developing operational performance measures at the program level. The PuMP performance measurement methodology was used to set high-level objectives and indicators by November 2020. The Working Group applied lessons learned to ensure that indicators being prepared were reliable and relevant to the NHS and are available for tracking. The focus now is on putting in place the infrastructure that is required to implement performance indicators including a master data source for the outputs that CMHC is attempting to track (knowledge transfers, case studies, product indicator). There may be challenges associated with developing a universal set of indicators for a suite of programs that are unique in their objectives.

Finding 15

It is a best practice in program design to track the longer-term impacts and outcomes of funded RDI projects as well as to gather feedback from applicants on a regular basis to facilitate continuous improvement.

It was noted in documentation reviewed that it is valuable for organizations who administer awards and scholarship programs to track the longer-term outcomes of the supported research, understanding that research projects often span multiple years and often require relatively long periods of time before tangible outcomes are realized.

Most of the evaluated RDI programs require applicants to submit reports based on program reporting requirements. Information included in these reports vary between programs but can include qualitative and quantitative data such as the results of their respective projects, number of stakeholders engaged or number of partnerships created, and information related to knowledge mobilization activities.

Interviews with CMHC Program Officials noted that it would be beneficial to acquire a better understanding of the longer-term impacts of RDI-supported projects, especially with regards to knowledge transfer and uptake and the types of partnerships and connections that are being facilitated. It may be beneficial for CMHC to understand the broader impact of knowledge transfer activities, such as the level of adoption and uptake of a specific area of research or innovative solution.

Many of the recipients of RDI funding are individuals or community organizations who may have limited capacity to track detailed performance measures. Interviews with CMHC Program Officials noted that the **Demonstrations Initiative** plans to administer voluntary surveys one, three, and five years after a project is completed in order to capture high-level, qualitative data related to knowledge mobilization and uptake. The **Solutions Labs** program has a similar plan in place to administer voluntary surveys to applicants one to three years after project completion. This practice may be beneficial to implement across other evaluated RDI programs as it could allow CMHC to track impact over a longer period of time while also reducing the administrative burden on individuals and organizations with limited capacity. There may be limitations associated with this practice, as surveys would only be completed on a voluntary basis and technical issues may limit data collection. Additionally, it may be difficult to dedicate FTE resources and financial resources from program budgets to administer, collect, and analyze surveys on a long-term basis.

There may be an opportunity to leverage existing infrastructure (e.g., CMHC websites and the ECOH platform) to further enhance knowledge mobilization activities and capture relevant performance information. CMHC could utilize existing infrastructure to distribute surveys to stakeholders and gather stakeholder insight on relevant housing sector needs. Additionally, the existing infrastructure could be used to provide information and feedback to CMHC Program Officials which can be used to enhance and adapt application

forms for future rounds of competition. For example, CMHC could distribute surveys to stakeholders through these platforms or make changes to the application forms for future rounds of competition to capture information such as the channels through which applicants were made aware of that particular RDI program (e.g., social media, newsletters, word of mouth, etc.). There may also be an opportunity to adjust the reporting requirements and agreements made between CMHC and RDI program recipients to encourage tracking and reporting of outcomes over a longer period of time.

Other best practices in program design noted by the evaluation team include:

- Providing adequate administrative resources to facilitate the coordination of network activities, allowing researchers and other stakeholders to focus on their respective fields of study; and,
- Employing a multidisciplinary approach to network activities and engaging a wide variety of stakeholders is beneficial, especially with regards to housing research because it is often interconnected with many other fields of study, such as health and medicine.

The evaluation team also noted that **Solutions Labs**, **Demonstrations Initiative**, **Housing Research Awards Program**, and the **Research and Planning Fund** offer debrief meetings to any non-funded applicants who request them to improve their applications for a subsequent round of competition and provide feedback to CMHC Program Officials on the application process. However, this process doesn't gather feedback from funded applicants. **Solutions Labs** has consistently collected feedback from expert consultants, and has made changes to its evaluation process and applicant guide content as applicable. These practices allow for continuous improvement of the evaluated RDI programs such as tailoring programs to improve the responsiveness of target audiences to future calls for applications. There may be an opportunity for CMHC to offer support to applicants prior to the close of submissions to assist applicants with understanding the criteria and CMHC's expectations. The evaluation also noted that the programs delivered in partnership with the tri-council agencies (**Housing Research Scholarship Program** and the **Collaborative Housing Research Network**) have their own processes and do not necessarily provide verbal feedback to non-funded applicants.

7 Conclusions and Recommendations

The six evaluated RDI programs remain relevant as there continues to be a significant need to enhance expertise and capacity in Canada's housing sector. In addition, there are no other research- and innovation-based programs in Canada that provide support to as wide a range of housing stakeholders to enhance housing research, innovation, and capacity. The objectives of the evaluated RDI programs are consistent and well aligned with federal government and CMHC priorities. The design of the evaluated RDI programs enables CMHC to address both existing and emerging information gaps, priority research questions, and NHS priority areas over time through targeted calls for proposals or tailored communications.

The evaluated RDI programs are on track to contribute to the enhancement of expertise and capacity in the housing sector. They are enabling program recipients and participants to develop innovative solutions for housing problems, conduct research, form collaborative networks and multidisciplinary partnerships. Through the 117 funded applicants over the period of 2018 to 2020, the evaluated RDI programs have supported 50 innovative solutions and over 100 knowledge transfer activities, facilitated approximately 600 new or existing connections, collaborations, and partnerships, and connected with approximately 4,500 stakeholders. This is a significant contribution towards engaging housing sector stakeholders and providing opportunity for recipients to collaborate internally and externally within the housing sector.

The suite of evaluated RDI programs are perceived as being delivered in an economic and efficient manner; the team resources dedicated to the administration and delivery of these programs is perceived to be operating on a very lean basis. In particular, partnering with the tri-agencies (Canadian Institutes of Health Research, Social Sciences and Humanities Research Council, and National Sciences and Engineering Research Council) has contributed to the economical and efficient operation of the ***Housing Research Scholarship Program*** and the ***Collaborative Housing Research Network***.

The evaluation proposes the following four recommendations

In order to achieve the RDI's expected outcome of enhancing the expertise and capacity in the housing sector, the RDI must be able to improve the awareness, knowledge, and acceptance of innovative practices. This requires the effective dissemination of information through knowledge mobilization activities and their associated knowledge transfer products (e.g., project profiles). One key element to consider is to clearly establish what information is required for these products in order to ensure the systematic and comprehensive publishing of information across projects.

In addition, tracking, reporting, and disseminating interim, final, and longer-term impacts and outcomes of funded RDI projects can provide transparency on the results achieved, including number of stakeholders engaged and/or partnerships created; number of knowledge transfer activities conducted; and the impact of connections created as part of an RDI program. The CMHC website and NHS Progress Reports could be leveraged for this purpose.

It is important to gather data and track trends over a long period of time in order to better understand how affordable housing solutions and interventions are meeting the needs of Canadians. Having high quality housing data and research supports effective decision-making and partnerships between levels of government, the private sector, and non-profit organizations.

Recommendation 1

Increase the use of existing reporting infrastructure and the CMHC NHS website to:

- a) enhance knowledge mobilization activities in support of the broader RDI objective of enhancing expertise and capacity in the housing sector; and,
- b) facilitate and advance reporting of interim and final results of projects over the next several years.

CMHC high-level RDI reporting requirements should be operationalized at the program level to ensure the data collected is reliable and consistent in order to enable the timely reporting of interim and final results. Since project results in research-based programs can take time to achieve, reporting on interim results would enable the evaluated RDI programs to demonstrate progress towards meeting their longer-term outcomes. It would also facilitate connections and partnerships among housing sector stakeholders to discuss and collaborate on ongoing work. Overall, reporting interim and final results also supports the objectives of the evaluated RDI programs in building capacity within the housing sector.

Recommendation 2

Review existing reporting requirements for RDI programs to ensure adequate and relevant performance information is collected and allow for the reliable and consistent reporting on interim and final results.

While current methods of awareness-building through professional networks or through an existing contact at CMHC has been quite successful, there is an opportunity for CMHC to build a more robust communications and marketing strategy. This would increase awareness of the programs during calls for proposals, especially in areas where the RDI programs have had limited application uptake by select stakeholders groups (e.g., racialized communities and francophone researchers or groups or geographic regions such as northern communities). Once proposals are selected, announcing them enables housing sector stakeholders to discuss and collaborate on ongoing work, thereby enabling connections and partnerships. This is also important in response to an increasingly virtual world due to the COVID-19 pandemic.

There are ongoing efforts to publish completed projects within CMHC, such as developing a central repository on the CMHC website to highlight NHS project profiles. CMHC should continue to build on this work by systematically announcing completed projects and publishing their associated materials and outcomes. This highlights the work being done in the housing sector, promotes the types of projects that CMHC is funding, and enables the evaluated RDI programs to contribute to enhancing expertise and capacity in the housing sector.

Recommendation 3

Make greater use of CMHC's broader corporate infrastructure and channels to better tailor and disseminate information about calls for proposals, announcements of supported proposals, the completion of projects, and the publication of information about project outcomes.

Applicants are required to find and work with an expert **Solutions Labs** consultant to apply, design, and deliver each **Solutions Labs** project. CMHC has prepared a list of **Solutions Labs** consultants to assist applicants in their search for an appropriate consultant. Having more information about the specific interests of each of the listed consultants could facilitate the selection by applicants of an expert consultant who is most aligned to their specific interests.

Recommendation 4

Increase the availability of detailed information about the published listing of expert consultants for Solutions Labs to indicate their key areas of expertise and housing specialty.

Annex A: Acronyms and Abbreviations

CHRN

Collaborative Housing Research Network

CIHR

Canadian Institutes of Health Research

CIHR-IPPH

Canadian Institutes of Health Research Institute of
Population and Public Health

CMHC

Canada Mortgage and Housing Corporation

NHS

National Housing Strategy

NSERC

National Sciences and Engineering Research Council

QA

Quality Assurance

RDI

Research and Data Initiative

SSHRC

Social Sciences and Humanities Research Council

Annex B: Key Definitions

Table 6: Key Terms Used in the RDI Evaluation

Term	Definition
Affordability	The household has the financial ability or means to effectively enter or compete in the housing market.
Affordable Housing	A housing unit that can be owned or rented by a household with shelter costs (rent or mortgage, utilities, etc.) that are less than 30 per cent of its gross income.
Collaboration	Two or more people/organizations working together toward shared goals.
Community Housing	An umbrella term that typically refers to either housing that is owned and operated by non-profit housing societies and housing cooperatives, or housing owned by provincial, territorial or municipal governments.
Core Housing Need	A household is considered in “Core Housing Need” if its housing does not meet one or more of the adequacy, suitability or affordability standards, and it would have to spend 30% or more of its before-tax income to access acceptable local housing. Acceptable housing is adequate in condition, suitable in size, and affordable. Adequate housing does not require any major repairs, according to residents. Suitable housing has enough bedrooms for the size (number of people) and makeup (gender, single/couple, etc.) of the needs of the households, according to National Occupancy Standard (NOS) requirements. Affordable housing costs less than 30% of before tax (gross) household income (Government of Canada, 2018b).
Partnership	<p>A collaborative arrangement. In NHS documentation, a partnership is an agreement between organizations or people to work together toward a shared goal.</p> <p>The definition of a partnership varies slightly throughout the evaluated RDI programs. Partnerships may be considered to include funding partners; community partners; academic partners; and stakeholders. A partner could also be any contributor, either in-kind or monetary, who has a vested interest in implementing or scaling the project. At times, a co-applicant or collaborator on a project may also be considered to be part of a partnership.</p>
Vulnerable Populations	Women, children and persons belonging, or perceived to belong, to groups that are in a disadvantaged position or marginalized are often referred to as vulnerable groups. As per the National Housing Strategy Glossary of terms priority vulnerable groups/populations are defined to include survivors (especially women and children) fleeing domestic violence; seniors; Indigenous peoples; people with disabilities; those dealing with mental health and addiction issues; veterans; LGBTQ2+; racialized persons or communities; newcomers (including refugees); individuals and families experiencing homelessness; and young adults (Government of Canada, 2018b).
Commitment Data	Includes active and completed RDI-related contracts with recipients of funding
Expenditure Data	Includes funding that has been administered to funded applicants

Annex C: Program Profiles

Demonstrations Initiative

The Demonstrations Initiative (Demonstrations) is intended to assist affordable housing stakeholders to demonstrate and showcase innovative practices, technologies, programs and strategies. This is expected to improve the performance, viability and effectiveness of affordable housing solutions that will better meet the housing needs of Canadians. Demonstrations has an annual budget of \$1.5 million, with the exception of its first year of implementation (2018), where the budget was \$500,000.

Demonstrations provides a platform to:

- Create and disseminate real-world data and information on affordable housing;
- Demonstrate innovative solutions that aim to improve the performance, viability and effectiveness of affordable housing solutions; and
- Foster a culture of innovation in the affordable housing sector that will better meet the housing needs of Canadians.

The Demonstrations initiative offers solutions aiming to:

- Strengthen, better equip and innovate the affordable housing sector; and
- Increase stakeholder's awareness, knowledge and acceptance of promising innovations.

Authorities and program parameters provide Program Officials with flexibility on the mechanisms by which funded projects can be identified in any given year. There are multiple "streams of work" options, but at this early stage, the annual call for proposals has been the primary mechanism activated. Other mechanisms could include a National Demonstration Challenge or Directed Projects in partnerships with organizations.

The scope of this evaluation covered two open call competitions for the Demonstrations Initiative. As of September 30, 2020, CMHC received a total of 55 applications. Applying a rigorous review process and selecting projects rated as excellent (acquiring a minimum score of 80%), CMHC has consistently expended its funding envelope to support 17 projects.

Demonstrations showcase innovative practices, technologies, programs, policies and strategies. Demonstration formats include on-site tours, virtual tours, best-practices guides, case studies, factsheets, website content, user experience videos, surveys and innovation profiles.

By enabling the sharing of information on successful affordable housing tactics, the Demonstrations Initiative aims to help foster awareness and uptake of innovations in the affordable housing sector more quickly than would otherwise happen by helping to reduce real and perceived risks. Through Demonstrations, projects can show what works and what does not, including, but not limited to, in actual affordable housing projects funded under the NHS. By supporting leaders in the sector to deploy, monitor and demonstrate practical but leading-edge measures, CMHC acts as a knowledge mobilization platform for Demonstrations to improve awareness, knowledge, and acceptance of promising innovations.

Solutions Labs

The Solutions Labs initiative had an annual budget of \$3 million, with the exception of its first year of implementation, where the budget was \$500,000. The Solutions Labs aims to assist stakeholders from all sectors across Canada to co-develop solutions to housing-related issues that address the NHS goals and contribute to the expected outcomes of the NHS. Projects must focus on one of the identified six NHS priority areas.

The initiative brings support for collaborative development of policies, programs, practices, and technologies that will lead to pragmatic solutions that reduce obstacles to affordable housing provision for all Canadians, including priority populations that the NHS targets such as seniors, newcomers, survivors fleeing domestic violence, Indigenous peoples, youth, people with disabilities, veterans, racialized persons or communities, people dealing with mental health and addiction issues, people experiencing homelessness, and the LGBTQ2+ community.

The program requires applicants to seek out and partner with experts in the design and implementation of Solutions Labs on their team. The teams are made up of diverse stakeholders—including those with lived experience and expert innovation consultants.

Together, they will problem-solve using an innovation lens and the tools and methodologies that have emerged from social innovation labs. The team will use an inclusive process. This fosters a ‘ground up’ approach to understanding and addressing key barriers to solving complex and persistent affordable housing problems. They will:

- examine and reframe current housing issues
- use innovative problem-solving processes
- co-develop potential solutions to be prototyped and tested

The teams in the labs will lead to the development of solutions to identified housing issues within the National Housing Strategy’s key priority areas. Potential solutions may include:

- emerging technologies
- best practices
- innovative policies
- programs

There are three different funding streams through which Solutions Labs projects can be supported:

- Annual open competitive Request for Proposals
- Directed Solutions Labs
- Solutions Labs in NHS-funded affordable housing projects (not yet activated)

As of September 30, 2020, two of the three funding streams have been activated and as such, two streams were included in the scope of this evaluation. The scope of this evaluation covered 3 open call competitions for Solutions Labs. CMHC received a total of 171 applications. Applying a rigorous review process and selecting projects rated as excellent (minimum score of 80%), CMHC has consistently expended its funding envelope to support 47 projects.

Solutions Labs is expected to serve as a catalyst for driving action and innovation in the affordable housing sector. It enables opportunities to enhance sector viability and sustainability by providing roadmaps from successful solution development to full-scale uptakes.

Research and Planning Fund

With the exception of its first year, where funding was \$600,000, the Research and Planning Fund has an annual budget of \$750,000 which provides support for housing research. The objectives are to:

- Build collaboration, engagement and alignment with stakeholders working to achieve common goals; and
- Support the housing community’s research capacity development.

The Research and Planning Fund provides support to non-profit organizations, registered charities, Indigenous governments, and Indigenous organizations who are undertaking housing research. These grants are not available to academic researchers; however, they can partner with applicants.

This stakeholder-focused funding opportunity helps promote interest and involvement in housing research outside of government by:

- Supporting data development;
- Cultivating and supporting highly focused expertise to rapidly overcome challenges; and
- Developing solutions to improve affordable housing for communities across Canada.

The Research and Planning Fund provides financial support in four different streams:

- Funding support for individual research projects;
- Funding support for a program of research;
- Funding support for planning activities designed to identify research priorities or lay the groundwork for research; and
- Funding support for knowledge mobilization projects.

The Research and Planning Fund seeks applications to support planning and research activities that address NHS priority themes and populations, aim to build collaboration, engagement and alignment or supports the housing community's research capacity development.

The scope of this evaluation covered two open call competitions for the Research and Planning Fund. As of September 30, 2020, CMHC received a total of 113 applications. Applying a rigorous review process and selecting projects rated as excellent (minimum score of 80%), CMHC has consistently spent its funding envelope to support 19 projects.

Housing Research Awards Program

With an annual budget of \$50,000, the Housing Research Awards Program provides recognition to world-class housing research. The awards support research teams so that they can expand their work and share their knowledge. The awards recognize activities that are impactful and innovative in Canadian housing including: housing research; research training; and knowledge mobilization and outreach. They are designed to build on and sustain Canada's research-based knowledge culture across all fields related to housing. This includes social sciences and humanities, health and technology.

There are four awards that are provided annually:

- CMHC President's Medal for Outstanding Housing Research (\$20,000)
- Gold Roof Award for Housing Research Excellence (\$10,000)
- Gold Roof Award for Knowledge to Action (\$10,000)
- North Star Travel Award for Northern or Remote Research (2 or more up to \$5,000)

The scope of this evaluation covered two open call competitions for this particular program. The goal of supporting high quality projects (minimum score of 80%) across each award category was achieved. As of September 30, 2020, CMHC has received 24 applications and funded 10 projects.

Housing Research Scholarship Program

With the exception of its first year where funding was \$50,000, the Housing Research Scholarship Program operates with an annual budget of \$450,000, that supports larger in-depth research in the priority areas of the NHS. This research program is undertaken in co-operation with three federal funding organizations: The Social Sciences and Humanities Research Council (SSHRC); the Natural Sciences and Engineering Research Council (NSERC); and the Canadian Institutes of Health Research Institute of Population and Public Health (CIHR-IPPH).

Funding for the Housing Research Scholarship Program is available to postdoctoral fellows undertaking research projects that address housing related issues identified under the National Housing Strategy's priority areas. The Housing Research Scholarship Program application process occurs annually through the postdoctoral fellowship competitions of each of the federal granting agencies. In 2018 and 2019, utilizing the open postdoctoral training awards competitions and rigorous peer review processes of the three federal research funding agencies (CIHR, NSERC, and SSHRC), CMHC funded 16 postdoctoral fellows¹⁴ in the first two rounds of the program for a total CMHC commitment of \$765,000. In addition to needing to be deemed meritorious in the extremely competitive federal competitions, the proposals must also meet a relevance review by CMHC to ensure the proposed project is aligned with the goals of the National Housing Strategy.

The CMHC Housing Research Scholarship Program targets research in the priority areas of the National Housing Strategy. Recipients of these awards will undertake projects that are expected to contribute to the generation of new housing-related knowledge that has the potential to lead to intellectual, cultural, social, and economic influence, benefits and impacts for Canadians, including the potential to improve health and well-being. This training is also critical to support the individuals' development towards future careers in housing research, in academia, and beyond.

¹⁴ As of September 30, 2020.

Collaborative Housing Research Network

With the exception of its first year, where funding was \$450,000, the Collaborative Housing Research Network (CHRN) utilizes an annual budget of \$1.75 million to support its independent, Canada-wide collaboration of academics and community partners. The Network focuses on researching housing conditions, needs and outcomes. This is expected to provide objective, recognized, and high-quality research that supports housing policy decision-making and inform future program development. The Network is supported as a joint initiative by CMHC and by the Social Sciences and Humanities Research Council (SSHRC).

The Network's objectives are to:

- Generate new knowledge by conducting research across a nationally linked network of researchers and housing related stakeholders across all disciplines; and
- Bridge gaps between research outcomes and impact on housing by:
 - Accelerating the translation of research discoveries into decision-making, best practices and/or the marketplace;
 - Developing, validating and evaluating interventions that change significant aspects of practice; and
 - Evaluating outcomes of implementation of interventions to demonstrate impact.

The CHRN is a research partnership between academics and community organizations. Independent, interdisciplinary teams of academics and community partners are expected to support housing sector innovation and new housing solutions. The network aims to focus on the holistic research of housing conditions, needs and outcomes in the priority areas.

The Canada-wide Network is composed of one National Knowledge Mobilization Hub and five thematic Research Teams with the following roles:

- The Hub coordinates and manages research collaboration and planning internally between the Teams, as well as externally to academia, government and the housing community.
- Each Research Team bring together a unified group of investigators and other stakeholders. They are encouraged to have national representation with a minimum of three regions represented in each Team. Each Team focuses on one thematic area identified in the National Housing Strategy.

The Hub and Research Teams are expected to contribute to:

- Knowledge creation – short-term and longitudinal research, data development and analysis;
- Knowledge dissemination – publications, conferences, case studies and workshops with relevant stakeholders; and,
- Capacity building – professional development, mentoring of researchers and for research professionals across the career continuum.

Funding to develop and implement the CHRN was provided by CMHC and made available through SSHRC's Partnership Development Grant and Partnership Grant Programs. The CHRN utilized the 2-stage program structure and rigorous peer review process of SSHRC's Partnership Development Grants and Partnership Grants in its development. As of September 30, 2020, 19 applications were received for Stage 1 (Development Grants), of which eight were funded and invited to submit full proposals to Stage 2 (Development Grants). The funding envelope and the recommendation of the peer-review committee allowed for the support of six successful full proposals for initial 5-year grants, aligning with the vision set out in program design, funding six high-quality research teams.

Annex D: Logic Models

The following Research and Data Initiative logic models were prepared based on documentation and were validated with CMHC Program and/or Policy Measurement and Analysis Officials.

The logic models presented below include:

- | | |
|---|---|
| <ol style="list-style-type: none"> 1. Research and Data Initiative (overall); 2. Demonstrations Initiative; 3. Research and Planning Fund; | <ol style="list-style-type: none"> 4. Solutions Labs; 5. Housing Research Awards Program; 6. Housing Research Scholarship Program; and 7. Collaborative Housing Research Network. |
|---|---|

Figure 2: Logic Model Legend



Figure 3: Overall Research and Data Initiative Logic Model

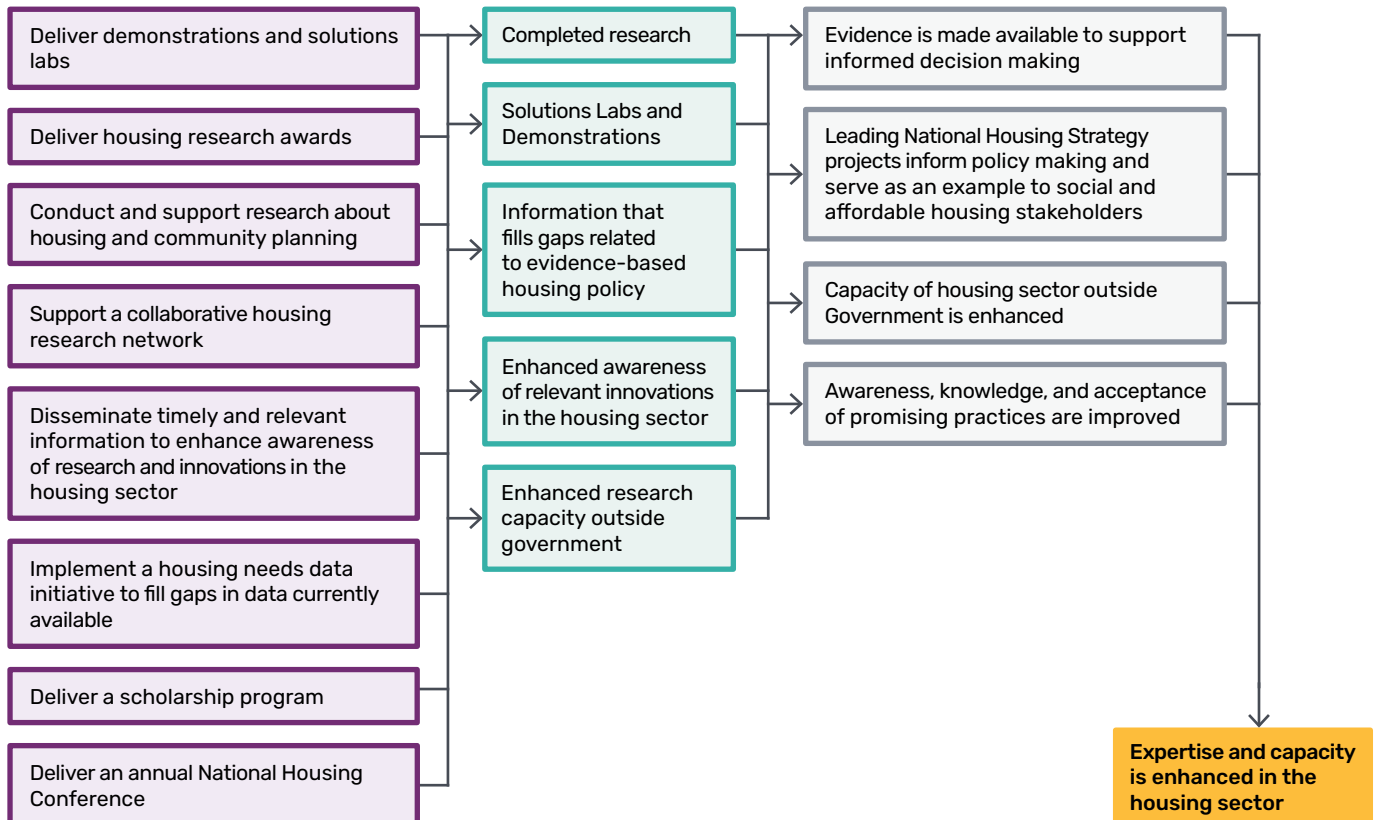


Figure 4: Demonstrations Initiative Logic Model

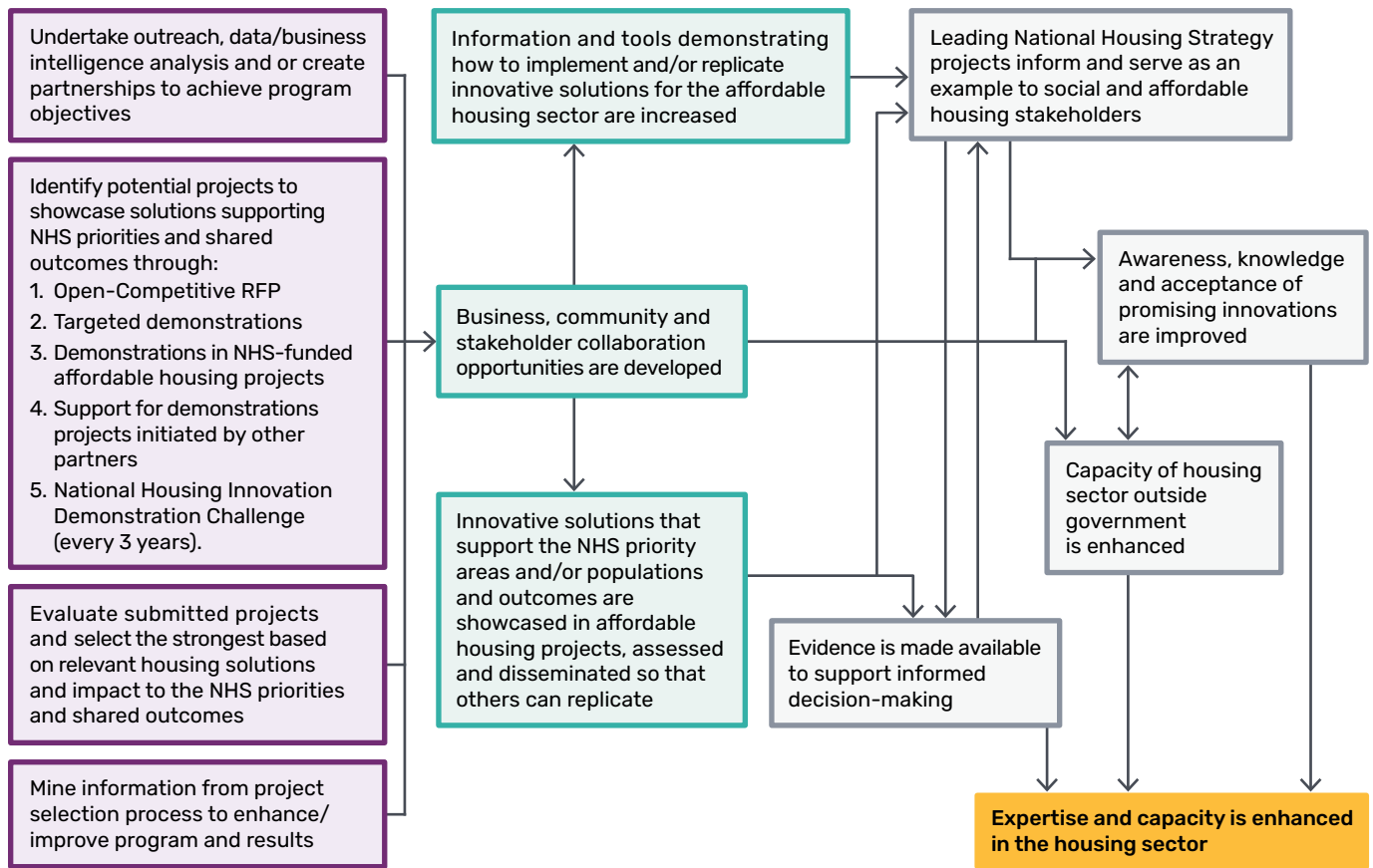


Figure 5: Solutions Labs Logic Model

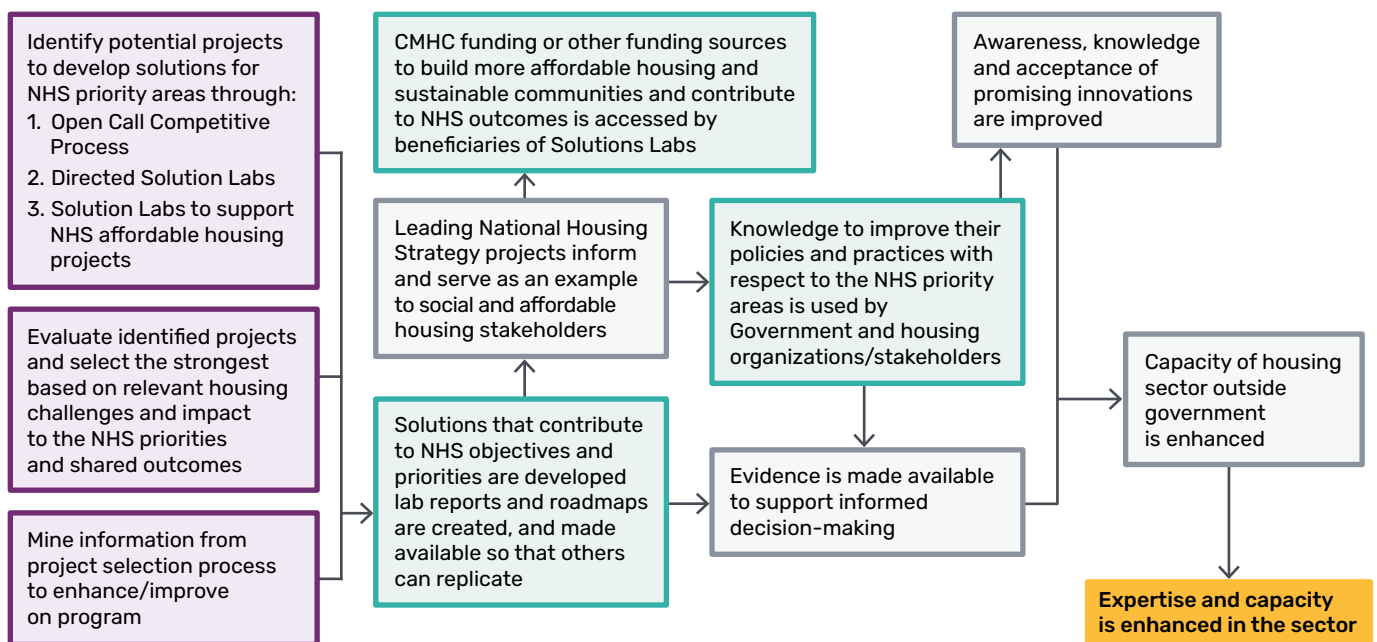


Figure 6: Research and Planning Fund Logic Model

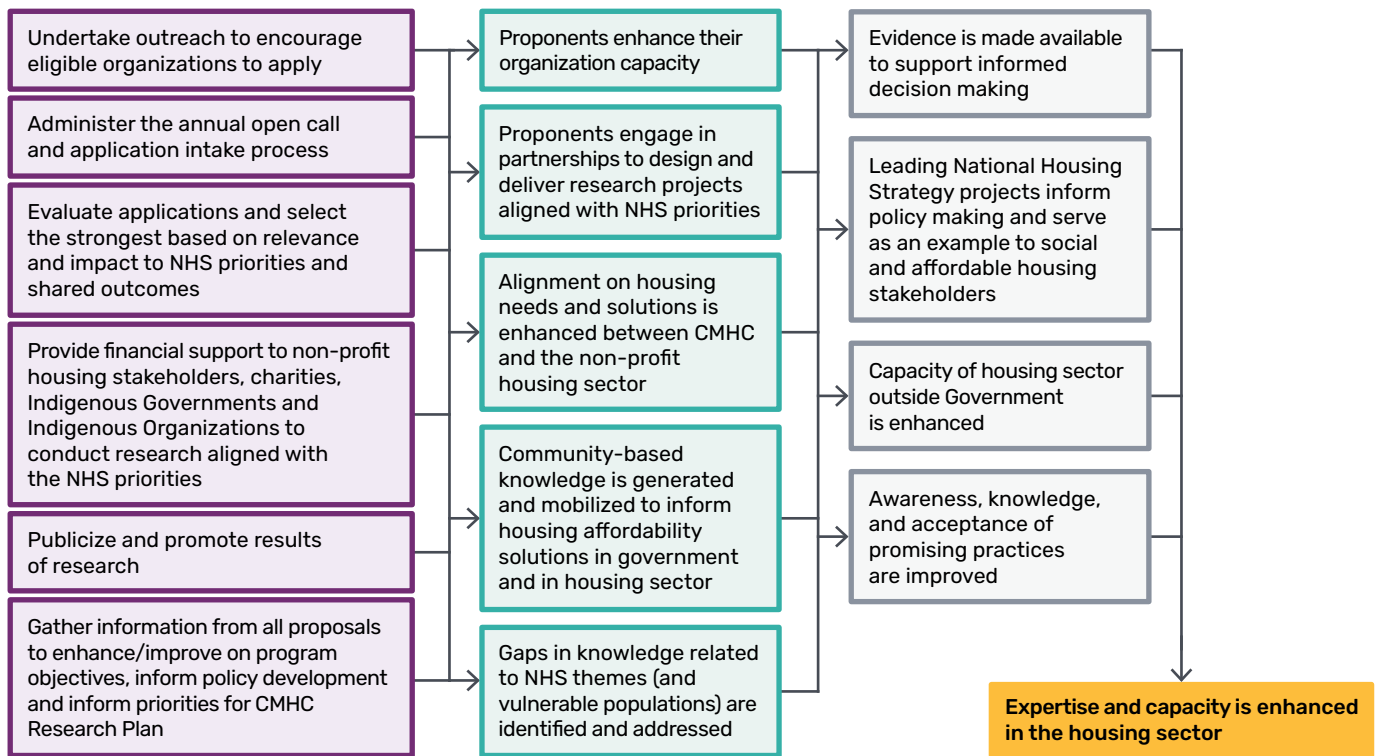


Figure 7: Housing Research Awards Program Logic Model

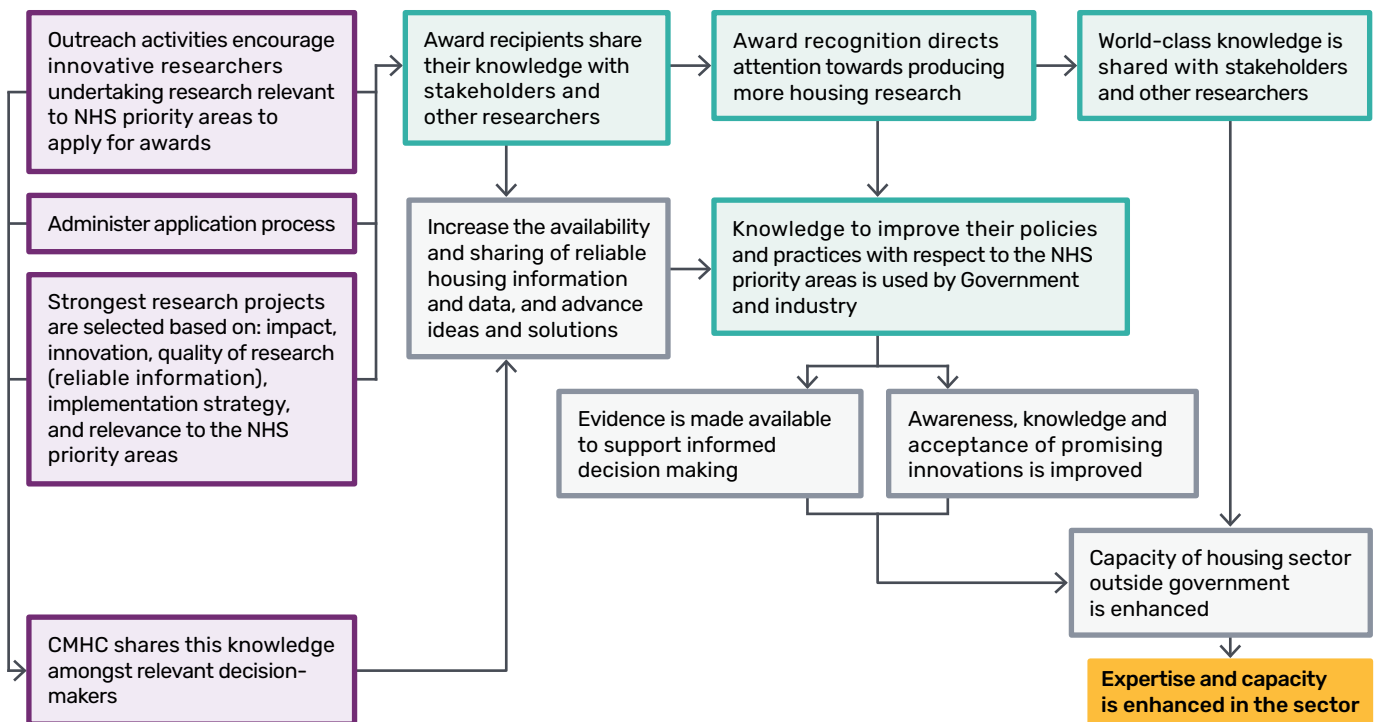


Figure 8: Housing Research Scholarship Program Logic Model

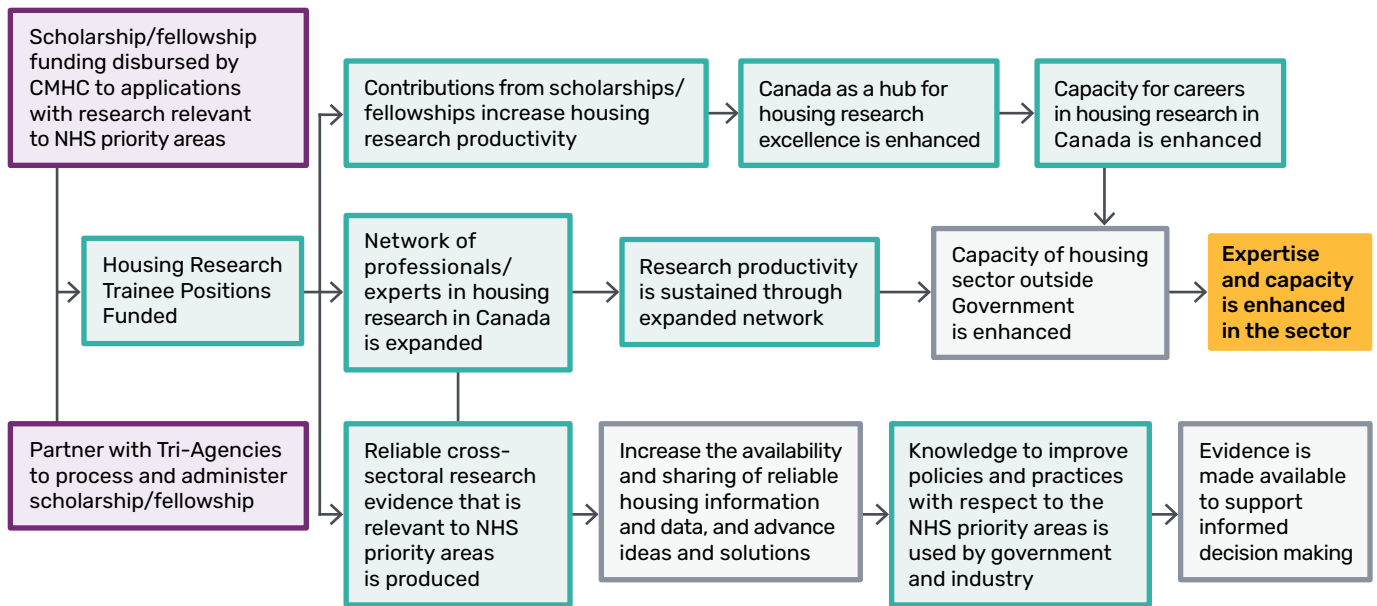
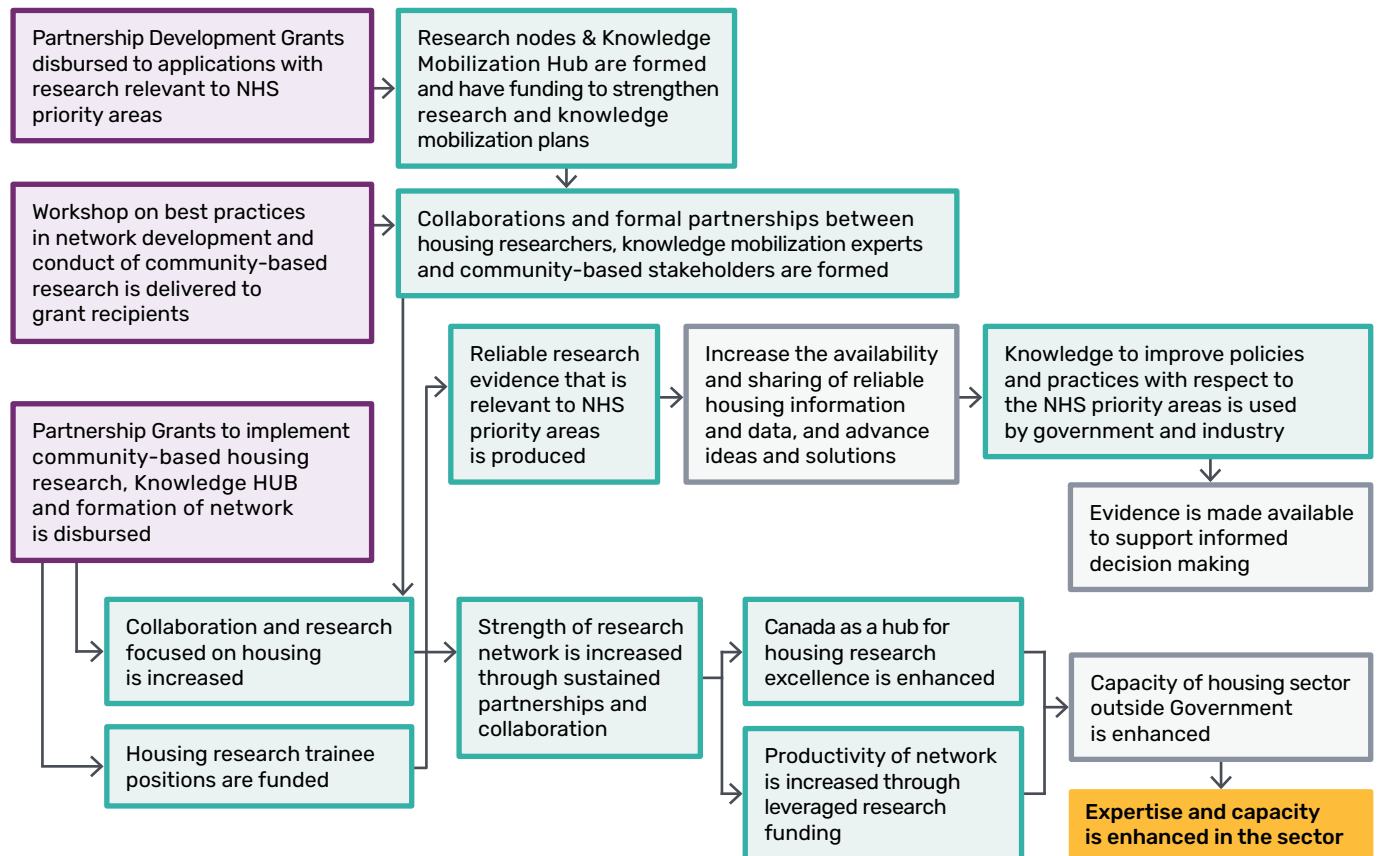


Figure 9: Collaborative Housing Research Network Logic Model



Annex E: Evaluation Matrix

Several lines of evidence were used to gather data and information about each evaluation question and related evaluation indicators.

Table 7: Lines of Evidence Used to Inform the Evaluation Questions and Main Indicators

Evaluation Questions	Main Indicators	Internal Document Review	External Literature Review	Key Informant Interviews
Relevance				
1. Is there a continued need to enhance expertise and capacity in the housing sector?				
	Perceptions of key informants regarding the extent to which research and capacity building is adequate to meet the challenges of Canada’s housing sector			X
	Evidence in document and literature review regarding the nature and extent of Canada’s housing sector challenges and trends over time	X	X	
	Perceptions of key informants regarding their awareness of effective outcomes, solutions, and/or products that can serve as examples to social and affordable housing stakeholders [Demonstrations Initiative; Housing Research Awards Program]			X
	Evidence in document and literature review regarding the nature and extent of current housing research, as well as trends over time	X	X	
	Evidence in documents and literature review regarding the extent to which there is a continued need to enhance expertise and capacity in Canada’s housing sector	X	X	
	Perceptions of key informants regarding the extent to which there is a continued need to enhance expertise and capacity in Canada’s housing sector			X
	Perceptions of key informants regarding the extent to which there is a perceived need for knowledge creation, knowledge dissemination, and capacity building within Canada’s housing sector [Collaborative Housing Research Network]			X
	Perceptions of key informants regarding the extent to which there is a perceived need for the demonstration of innovative housing solutions and to foster a culture of innovation in the affordable housing sector [Demonstrations Initiative]			X

Evaluation Questions	Main Indicators	Internal Document Review	External Literature Review	Key Informant Interviews
	Perceptions of key informants regarding the extent to which there is a perceived need for supporting the housing community's research capacity development and building collaboration among housing sector stakeholders [Research and Planning Fund]			X
	Perceptions of key informants regarding the extent to which there is a perceived need for developing innovative solutions to identified housing issues [Solutions Labs]			X
	Perceptions of key informants regarding the extent to which there is a perceived need for the recognition of impactful housing research and the support of knowledge mobilization [Housing Research Awards Program]			X
	Perceptions of key informants regarding the extent to which there is a perceived need for the recognition of excellence in early-career academic research and the expansion of the community of qualified researchers [Housing Research Scholarship Program]			X
	Evidence in document and literature review regarding the extent to which the RDI complements or duplicates other similar initiatives and programs	X	X	
	Perceptions of key informants regarding the extent to which the RDI complements or duplicates other similar initiatives and programs			X

2. Are the objectives of the RDI programs consistent with federal government and CMHC priorities?

	Evidence in documents and literature review regarding the extent to which the RDI aligns with federal government acts, legislation, and regulation	X	X	
	Evidence in documents and literature review regarding the extent to which the RDI aligns with federal strategic direction (e.g., Budget, speeches from the throne, departmental plans and priorities, etc.)	X	X	
	Perceptions of key informants regarding the extent to which the RDI aligned with federal strategic direction			X

Evaluation Questions	Main Indicators	Internal Document Review	External Literature Review	Key Informant Interviews
	Evidence in documents and literature review regarding the extent to which the RDI programs are aligned with CMHC plans and priorities	X	X	
	Perceptions of key informants regarding the extent to which the RDI is aligned with CMHC plans and priorities			X

Effectiveness (Performance)

3. To what extent have the RDI programs contributed to the achievement of intended results of the National Housing Strategy?

3.1 Extent to which timely and reliable housing data and information has been made available to support informed decision making	Perceptions of key informants regarding the extent to which timely and reliable housing information has been made available to support informed decision making			X
	Number of innovative solutions addressing the challenges within Canada's housing sector and support the NHS priority areas	X	X	
	Number of knowledge transfer activities and products, including project profiles, available specifically addressing the NHS priority areas (number completed; number underway)	X	X	
3.2 Extent to which the RDI programs contribute to knowledge, technical capacity, and research capacity in the housing sector	Perceptions of key informants regarding the extent to which the RDI programs contribute to knowledge, technical capacity, and research capacity in the housing sector			X
	Number of housing research activities that are supported by the RDI programs and specifically address NHS priority areas	X	X	
	Perceptions of key informants regarding the replicability of innovative solutions to address challenges within Canada's housing sector			X
	Number of funded applicants per RDI program	X		
3.3 Extent to which the RDI programs have contributed to improved awareness, knowledge and acceptance of promising innovation	Perceptions of key informants regarding the extent to which the RDI programs contribute to improved awareness, knowledge, and acceptance of promising practices			X

Evaluation Questions	Main Indicators	Internal Document Review	External Literature Review	Key Informant Interviews
3.4 Extent to which Solutions Labs and Demonstrations have identified and advanced knowledge regarding opportunities for innovation to address issues in Canada's housing sector	Evidence regarding the extent to which Solutions Labs have identified and advanced knowledge regarding opportunities for innovation to address issues in Canada's housing sector	X		X
	Evidence regarding the extent to which Demonstrations have identified and advanced knowledge regarding opportunities for innovation to address issues in Canada's housing sector	X		X
3.5 Extent to which the RDI programs enable the facilitation of partnerships	Perceptions of key informants regarding the extent to which the RDI programs enable the facilitation of partnerships			X
	Number of partnerships formed as a result of participating in an RDI program	X		
3.6 Extent to which the RDI programs enable collaboration, engagement, and alignment among housing sector stakeholders	Perceptions of key informants regarding the extent to which the RDI enables collaboration, engagement, and alignment among housing sector stakeholders			X
	Number of stakeholders active in each evaluated RDI program	X		
	Perceptions of key informants regarding the extent to which RDI programs enable the sharing of information and housing research			X
3.7 Extent to which the RDI programs enable the sharing of information and housing research	Number of knowledge transfer activities and products available specifically addressing NHS priority areas	X	X	X

Evaluation Questions	Main Indicators	Internal Document Review	External Literature Review	Key Informant Interviews
Efficiency (Performance)				
4. Are the RDI programs being delivered in an economic and efficient manner?				
	Perception of key informants regarding the extent to which the RDI is reaching expected target audiences			X
	Number and type of participants/applicants per RDI program	X		
	Amount of funding committed per RDI program	X		
	Planned versus actual program spending	X		
	Perceptions of key informants regarding the extent to which the resources dedicated to the RDI programs are adequate and optimized (e.g., FTE resources, financial resources, operating margins, administrative efficiencies)			X
	Evidence in documentation regarding the extent to which the resources dedicated to the RDI programs are adequate and optimized (e.g., FTE resources, financial resources, operating margins)	X		
	Perceptions of key informants regarding the extent to which funding is allocated efficiently to maximize outcomes			X
	Perceptions of key informants regarding opportunities to improve the delivery of RDI programs			X
	Evidence in documents and literature review regarding the extent to which diversity and inclusion factors (e.g., GBA+) are considered in the delivery of RDI programs	X	X	
	Perceptions of key informants regarding the extent to which diversity and inclusion factors (e.g., GBA+) are considered in the delivery of the RDI programs			X
	Factors contributing to and constraining the efficiency of the delivery of the RDI programs	X	X	X

Evaluation Questions	Main Indicators	Internal Document Review	External Literature Review	Key Informant Interviews
5. Are there more economic or efficient ways to design the RDI programs?				
	Perceptions of key informants regarding the strengths and weaknesses/challenges of the design of the individual RDI programs (as well as the Research and Data Initiative as a suite of programs that form part of the NHS)			X
	Perceptions of key informants regarding opportunities to improve the design of the RDI programs			X
	Lessons learned in program design	X	X	X
	Best practices in program design	X	X	X
	Extent to which the RDI programs' performance measurement practises clearly define target groups, objectives, activities, outcomes, and the linkages	X		X
	Extent to which the RDI programs' performance indicators are valid, reliable, affordable (collected in a cost-effective manner), available, and relevant	X		X
	Perceptions of key informants regarding suggestions for improving performance reporting and measurement			X

Annex F: Evaluation Methodology and Quality Assurance

Evaluation Methodology

The following paragraphs describe how each methodology was used to address the evaluation questions. A summary of how the data sources were used to address the evaluation questions is also provided in the evaluation matrix in [Annex E: Evaluation Matrix](#).

Evaluation Question 1: Is there a continued need to enhance expertise and capacity in the housing sector?

The internal and external documentation review were key sources of information on the current state of Canada's housing sector and housing research, including challenges within the sector and trends over time. In addition, documents reviewed provided information related to the need to enhance expertise and capacity in Canada's housing sector. Interviews with key informants, including CMHC officials and program participants, were valuable to gather perceptions of those involved with the evaluated RDI programs on the continued need to enhance housing research capacity, create innovative solutions to identified housing issues under the NHS priority areas, and disseminate housing sector-related knowledge. These sources also helped to address information gaps uncovered in the documentation review.

Evaluation Question 2: Are the objectives of the RDI programs consistent with federal government and CMHC priorities?

The document, data, and literature review facilitated understanding of the alignment of the evaluated RDI programs with federal legislation, priorities (e.g., the National Housing Strategy), and CMHC strategic direction. It also provided insight into the extent, if any, of duplication or complementarity of the evaluated RDI programs with other existing initiatives. Key informant interviews supplemented information gathered through the documentation review to better understand the extent to which there is alignment between the six RDI programs evaluated and federal government and CMHC priorities.

Evaluation Question 3: To what extent have the RDI programs contributed to the achievement of intended results of the National Housing Strategy?

Program documentation and key informant interviews with program participants were key sources of information for examining performance. Information gathered from key informant interviews provided insight into the extent to which RDI programs contribute to enhancing housing research capacity, advancing knowledge regarding opportunities for innovation, enabling partnerships and collaboration, and enabling sharing of housing research. Program documentation also provided quantitative data related to the achievement of outcomes, such as the number of funded applicants, number of partnerships formed, and number of housing research activities supported by the evaluated RDI programs, among others. Interviews with delivery partners and CMHC officials provided additional perspectives on the extent to which the evaluated RDI programs have contributed to the achievement of outcomes.

Evaluation Question 4: Are the RDI programs being delivered to clients in an economic and efficient manner?

Internal program documentation was used to examine the efficiency of the delivery of the evaluated RDI programs. Budget and expenditure information for the evaluated RDI programs provided insight into planned versus actual spending and full-time equivalent (FTE) allocations. Perceptions of key informants provided additional depth to this information and helped to address data gaps to further explain the findings of the documentation review. Documentation review and key informant interviews also provided insights into factors contributing to and constraining the efficiency of the delivery of the evaluated RDI programs.

Evaluation Question 5: Are there more economic and efficient ways to design the RDI programs?

Key informant interviews were a key data source for identifying potential improvements to the design of the evaluated RDI programs. Feedback provided by funded applicants of the six RDI programs also highlighted the strengths and weaknesses of the evaluated RDI programs, as well as opportunities for design improvement.

Perceptions of key informants provided insight into the effectiveness of the performance measurement system and highlighted potential areas for improvement, and documentation review supplemented the findings gathered from interviews.

Please note that for externally delivered programs, design and delivery elements which are carried out by delivery partners were scoped out of the evaluation as they are evaluated by those agencies and are outside of CMHC’s span of control.

Table 8: Limitations to the Evaluation Methodology

Limitations	Impact	Mitigation Strategy
<p>The RDI is a ten-year initiative that was launched in November 2017. Projects can take several years to be implemented. Only a few projects have been completed to date.</p>	<p>As some projects were underway, the evaluation was limited in its ability to conclude on the extent to which outcomes had been achieved.</p>	<p>Evaluated the extent to which the program is on track to achieve the intended outcomes over the planned ten-year implementation period.</p>
<p>The evaluation had a relatively high dependence on a purposive sample of 43 key informant interviews.</p>	<p>Evaluation evidence could be opinion-based and thus subjective.</p>	<p>Triangulated evidence from discrete sets of interviews with a variety of key informants as defined in Figure 1: Number of informants per type of key internal and external informants, as well as relevant and available program data, documentation and literature.</p>
<p>Inconsistencies across different documentation and data sources, or inaccurate/incomplete information provided in the documentation provided.</p>	<p>Documentation may not provide the expected information related to an evaluation issue in a full and complete manner.</p>	<p>The evaluation team worked closely with the RDI programs to ensure that all documentation provided was the most current and accurate version available. Any inconsistencies across different data sources or documentation was mitigated through the information collected through the other lines of evidence and the triangulation of findings.</p>
<p>Some 2020-21 interim or final reporting was still underway and/or in the process of being received from the recipients of RDI funding after the evaluation data cut-off date of September 30, 2020.¹⁵</p>	<p>2020-21 performance, outcome, and/or output information is only partially reflective of the 2020-21 year.</p>	<p>Data limitations were noted in the evaluation findings as applicable. Evaluation findings were triangulated across all lines of evidence to ensure the most accurate information, as of September 30, 2020, was included in the evaluation.</p>

¹⁵ It is important to note that some 2020-21 interim and final reporting was still underway due to project timelines and COVID-19-related delays. Nine out of eleven final reports from 2018 Solutions Labs were referenced during data analysis. One interim report from 2019 projects was referenced during data analysis.

Quality Assurance

Evaluation Services strives to produce products that exceed the requirements of CMHC commitments to TBS, meet the Canadian Evaluation Society Standards, abide by CMHC’s Code of Ethics, and serve CMHC’s

internal program or initiative learning needs. To ensure evaluations are of high quality, key deliverables underwent a quality assurance (QA) process. At the conclusion of the evaluation project, CMHC’s Audit and Evaluation Sector’s Professional Practices Group also collects client feedback to make improvements.

Table 9: BDO and CMHC Evaluation Services Quality Assurance Practices

<p>BDO’s Quality Assurance Process</p>	<ul style="list-style-type: none"> • All deliverables were reviewed internally by the Project Manager to ensure their conformity with evaluation standards. • BDO assigned the Project Manager as the single individual who had overall responsibility for the quality and timeliness of all deliverables. • Bi-weekly touchpoints were scheduled between the BDO Evaluation Team and CMHC Evaluation Services and status reports were provided to identify progress and any issues.
<p>CMHC’s Quality Assurance Process</p>	<ul style="list-style-type: none"> • All deliverables provided to CMHC were reviewed and must have been accepted by the Evaluation Lead. • The Methodology Report and final Evaluation Report underwent an internal peer review as per Evaluation Services Guidelines and Procedures to provide senior management with assurance of the quality of evaluation products.

Annex G: Bibliography

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