Distress Centre Calgary

Coordination of Instrumental and Basic Needs Funds

Evaluation Report

Prepared By:
Brenda Simpson
1311 Hamilton St. N.W.
Calgary, AB, T2N 3W8
403-284-5845

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Executive Summary

The Instrumental Funds Coordination project succeeded in solidifying previous collaborative work that had been done to develop a common intake form. Protocols for use of the common intake form have been developed and communicated to referring agencies in the community. A website has been developed to create easier access to instrumental funds.

The service delivery model adopted for this project is a " **No Wrong Door"** approach, which allows broad access points through a coordinated common portal (common intake form and website), which then fans out to the appropriate instrumental funding source. Workers take care of most of the application processing and coordination behind the scenes, making both access and the application process much easier and less time consuming for the client.

Over the past eight months instrumental funds for homeless prevention have been provided to **over 500 families** including **853 children**, with a total disbursement of over **$309,000**.

Partners view this project as a first step toward a more fully coordinated and integrated system for homeless prevention. Many opportunities have been identified to more fully develop and enhance the current homeless prevention system.

These opportunities for development and enhancement include:

- Improving service coordination by creating stronger linkages with other service areas (e.g. immigrant homeless coordination project, homeless response services, etc.)
- Ensuring the website supports overall sector coordination with information and web links
- Improving information coordination through development of a common data collection system and possible database, with regular monthly or quarterly reports on demand, usage and general client demographics within the homeless prevention service area
- Streamlining common intake form to make it more user friendly
- Addressing identified emergency funding gaps such as mortgage payments, storage and moving fees
- Strengthening case management functions to improve long term client stability
- Developing a more formalized strategy for emergency shelter diversion

1.0 Introduction

The supply of affordable housing has been seriously eroded in Calgary over the past two years due to a number of factors including significant in-migration, depletion of rental stock due to demolition and/or condo conversion, increasing real estate prices resulting in increasing rents and extremely low vacancy rates. The 2006 City of Calgary Biennial Count of Homeless Persons[1] showed a **32% increase in homeless persons** enumerated from the 2004 to 2006 count. Included in this count were 145 homeless families.

The Homeless Family Sector in Calgary is made up of a number of service providers and funders who address the needs of Calgary families who find themselves homeless or at risk for being homeless for a variety of reasons. The Homeless Family Sector agencies provide a broad range of services that include emergency housing, transitional housing, longer term housing, instrumental funds for eviction prevention and/or housing access, personal support services, case management and personal/family development programs.

One of the priority strategies for dealing with homelessness is prevention. The first goal in the 2004-2008 Calgary Community Plan produced by the Calgary Homeless Foundation is to "prevent at-risk people from becoming homeless".

In 2004/05, a group of five Homeless Family Sector agencies underwent a sector review (Cairns & Hoffart, 2005), resulting in recommendations for improvements to the sector. The Pilot Project for Coordination of Instrumental Funds and Basic Needs is a direct response to the recommendations of the sector review. This coordination project is intended to develop a collaborative system and structures to facilitate easier client access to a variety of community programs that deliver different types of assistance for homelessness prevention, intervention and basic needs support.

Identified collaborative partners include: Distress Centre Calgary, Momentum, Salvation Army, Calgary Urban Projects Society, Red Cross and Inn from the Cold. In September 2007 Jewish Family Services Calgary joined the collaborative.

[1] City of Calgary. (2006a). *Results of the 2006 count of homeless persons in Calgary [2006 May 10]*. Retrieved February 12, 2007, from http://www.calgary.ca/portal/server.pt/gateway/PTARGS_0_2_404866_0_0_18/2006_calgary_homeless_count.pdf

In the original request for proposals, key project requirements were described as follows:

- Problem solve issues and concerns arising in the pilot intake form
- Review individual agency policies, procedures, protocols, funds spent, number and type of clients served, issues addressed,
- Review existing models used for data collection and reporting, and explore options for collaborative/coordinated data collection and reporting.
- Facilitate a process to build consensus in a longer-term vision of a centralized service delivery model for the distribution of instrumental funds for housing and basic needs with the organizations involved in delivery of these services
- Develop policies, procedures, protocols, data collection and reporting within a coordinated service delivery model

1.1 Project Coordinator Workplan

Although the original proposal did not set out specific objectives for the project, the following workplan outlines the project activities as described by the Distress Centre:

- Perform an external environment scan, starting with a review of the systems used by organizations in Toronto with a similar focus.

- Review and document the processes and data collection, decision tree and reporting systems utilized by the agencies working in the Calgary Homeless Family Sector. Also inventory all Calgary resources to ensure that no program or agency has been inadvertently left out of the process.

- Work with a computer programmer to develop a portal or blog site that can be used to facilitate communication across the committee and among community agencies. This site can form the basis for further developments including ideas such as an online intake form, common database and current status of available funds at various agencies.

- Develop outcome measures for fund disbursement ongoing evaluation

- Work with the committee to perform an end-of-project internal evaluation

1.2 Evaluation Methods

This evaluation was based on review of documents, forms and website, key information interviews and a phone survey of partner organizations. Feedback from referral sources was based on a survey conducted by the Advisory Committee as well as several phone interviews.

1.3 Overview of Project Activities

The main project activities during the eight month period from March to October 2007 have been as follows:

- Coordination of an Advisory Committee to guide the collaborative process
- Review of best practices reported in US Ten Year Plans, especially in the areas of eviction prevention and rapid re-housing.
- Some review of other homeless coordination models – most notably the Toronto Landlord Connect service
- Review and fine-tuning of the common intake form that was developed by the five partners prior to the coordination project start.
- Development of common intake protocols for referring agencies as well as inter-agency protocols for managing the forms
- Training sessions for referring agencies
- Development of a website for referring workers to access the common intake form, instructions, protocols and program criteria.

Activities not yet undertaken include:

- Development of a common data set for sector planning
- Development of a collaborative system for sharing data generated by partner agencies
- A vision for a collaborative service delivery system for the homeless family sector – i.e. where prevention links with other homeless family sector services

1.4 Project Background Research

Research for the coordination project was based on a review of information contained in the ten-year plan summarized on the National Alliance to End Homelessness.

Emergency prevention is described as,

"The most economically efficient way to end homelessness is to prevent its occurrence. Financial assistance to prevent an eviction, mediation to address problems with a landlord or lender, and case management can all prevent individuals and families from becoming homeless. A 1991 study of eviction prevention programs by the US Department of Health and Human Services found that the average cost to prevent family homelessness was one-sixth the average cost of a stay in a shelter. Yet a recent examination of the Continuum of Care planning process found that few communities dedicate substantial resources to preventing homelessness."

Emergency prevention strategies outlined in the Ten Year Plan of the National Alliance to End Homelessness and the Cycles of Homelessness Report[1] included the following elements:

1. **Eviction prevention funds** for rent, mortgage and utility assistance with **enhanced coordination and information** sharing among emergency assistance providers to maximize existing prevention dollars.

2. **Flexible funding**. Facilitate a range of strategies that can be combined to tailor to the specific needs of the individual or household.

3. **Access to information** and eviction prevention.

4. **Landlord/tenant** intervention strategies

5. **Case management** for those at risk of homelessness - combining emergency assistance with either time limited or ongoing case management to reduce future risk of homelessness

6. **One prevention gateway** – there are a number of ways to establish a single prevention gateway. Some communities use an established 211 or other hotline system for a central point of information and referral; some have a single facility to coordinate prevention services and some have a "no wrong door' policy that coordinates through a shared intake form across agencies. This strategy may even include pooling of prevention funds to avoid duplication and to streamline access to prevention assistance.

7. **Prevention targeting** – targeting efforts to neighborhoods with a disproportionate number of people seeking shelter

8. **Shelter diversion** – integrating homelessness prevention activities at intake sites for shelters

9. **Longer Term Support** – moving beyond one-time prevention payments to providing **time limited housing subsidies** until families become financially stable

[1] Retrieved October 2007 from www.halifax.ca/qol/documents/evictions_FinalHighlightsReport.pdf

2.0 Collaborative Service Delivery Model

The collaborative service delivery model developed for the Instrumental Funds Coordination Project is based on a "**No Wrong Door**" concept and contains most of the key elements identified from the research. Following is a brief description of how each of these strategies has been addressed to date.

Strategy #1: Enhanced Coordination and Information Sharing

(partially complete – data collection needs not yet addressed)

Advisory Committee: This strategy has been implemented primarily through regular meetings of the Advisory Committee.

The Advisory Committee is made up of front line worker representatives from the Homeless Family Sector agencies involved in provision of Instrumental Funds for homelessness prevention. The Committee is chaired and led by the Project Coordinator from the Distress Centre. Committee membership includes representation from:

- CUPS – Housing Assistance Program,
- Momentum – Rent Bank,
- Red Cross – Housing Advocates,
- Salvation Army – Family Services,
- Distress Centre – 211,
- Inn from the Cold, and
- Community Resources Centre Representative.

In September 2007 Jewish Family Services joined the committee. The Coordinator has recently invited a representative from the Government of Alberta – Homeless Eviction Prevention fund to join the committee.

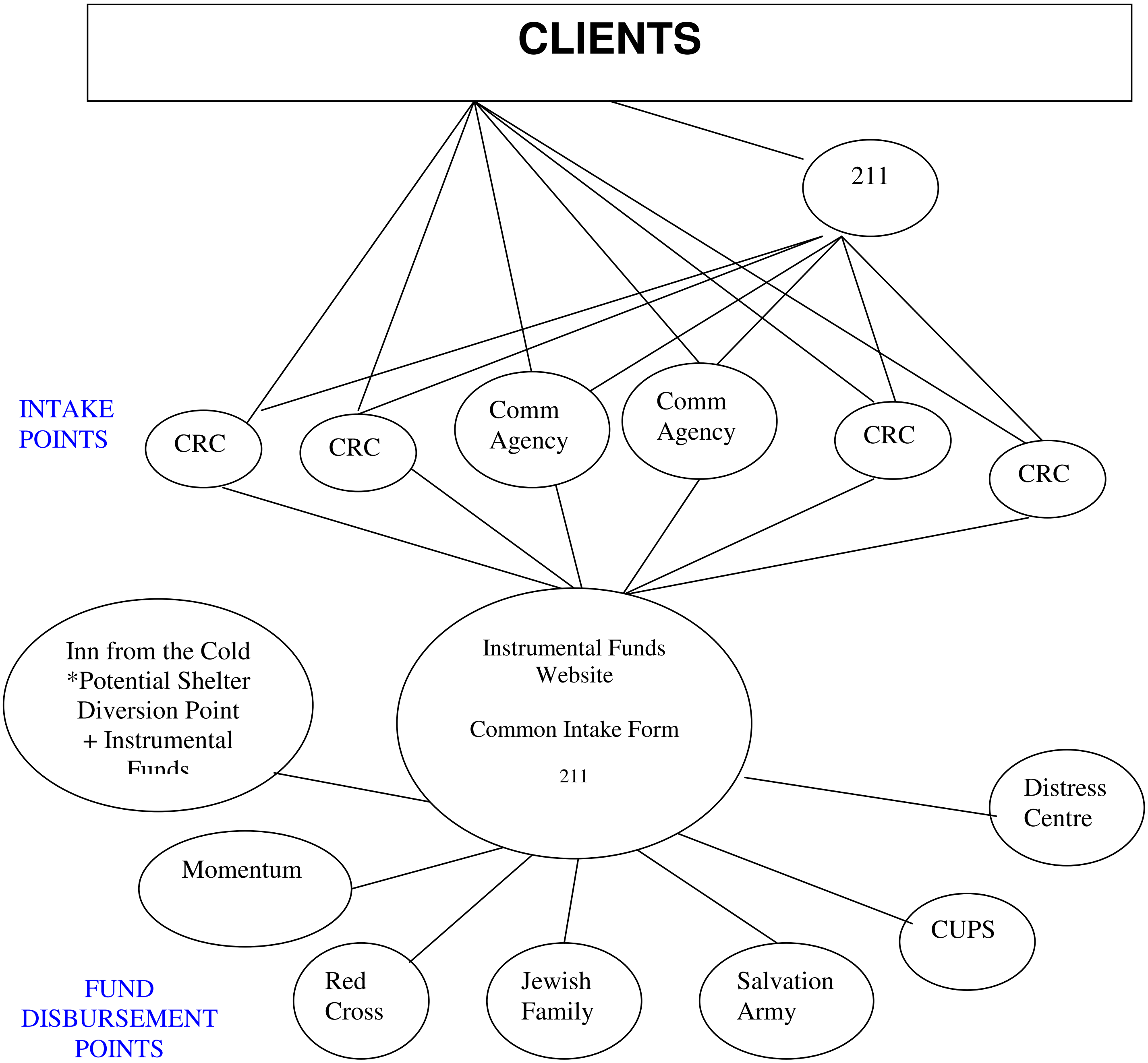
The Project Coordinator provides linkages to other emerging projects designed to serve homeless families such as the new Housing Locator project, the new Case Management project which is a collaborative effort between Aspen, CUPS and the Distress Centre (ISAAC), and more recently has linked with the Immigrant Homeless Coordination project. The Project Coordinator sits on the emergency planning subcommittee for the Ten Year Plan.

Due to the quickly evolving service environment, staying connected with key facets of the homeless sector development has been challenging.

Data Collection needs of the Instrumental Funds Coordination group were briefly discussed at an advisory committee meeting in June but have not yet been addressed.

Strategy #2: One Prevention Gateway – No Wrong Door (complete)

A key coordination strategy has been development of the "No Wrong Door" approach.



Most of the project work over the past eight months has been focused on development of this strategy. Elements of the strategy include:

Common Intake Form streamlines client access to instrumental funds by ensuring that all information required by programs/agencies providing these services is contained within one form. As a result, clients don't have to fill out different forms for different agencies as seek support.

Most of the work on the common intake form was completed prior to the start of this coordination project. However, the Advisory Committee did take time to review and fine-tune the form.

The Common Intake Form is completed by workers (not by clients) at a broad variety of Community Resource Centres (CRC) and other community agency locations across Calgary. Making access points as broad as possible allows clients quicker and easier access to instrumental funds at convenient locations within their own neighbourhoods. For financially disadvantaged groups, barriers such as transportation are reduced.

One disadvantage of the common intake form is the increased complexity and length that comes from accommodating many different service provider information needs. For example, one partner indicated that their original intake form contained 13 lines of information, while the current intake form is 10 pages long. Early feedback from referring agencies support this concern, describing the form as "time consuming, long and difficult to use with clients who have language barriers".[2]

However, thanks to training on protocols, partners report that the form has facilitated the intake process resulting in positive client impacts. Partners describe the benefits as improved access and reduced stress for the client due to time saved by filling in only one form instead of applying at several locations and by reducing the amount of time it takes to process an application and get approval for funds.

Calgary Housing Supports Website: A key part of the project was development of a website. This newly introduced website allows workers quick access to the common intake form and to information updates about service options and availability of instrumental funds within Calgary. The website provides a broad source of information on resources available to clients, links to partner agency programs and to the Housing Registry Network for affordable housing searches. Currently there are 71 registered users of the Calgary Housing Supports website, and workers are beginning to use the website "forum" as a place to discuss challenges and share information.

Limitations of the online application form include the fact that it cannot be saved or directed to agencies by email. It can only be printed and faxed. The website is also lacking a behind the scenes connection to a database to retain some of the rich

[2] Taken from internal document "Highlights from Feedback Forms", a summary of comments from a survey of referring agencies conducted in July 2007.

demographic and service information so carefully collected for intake and assessment.

Streamlined and Coordinated Protocols ensure that the intake form is directed to the most appropriate agency first. If this agency reviews the form and cannot assist the client, the agency worker passes the intake on to the next most likely source of instrumental funds. As the intake form passes from one agency to another, additional eligibility information is added and passed along as well. For example, if one worker has done a credit check or talked with a landlord this information is passed along with the intake form in order to reduce duplication of effort.

Common Intake Protocol
A client may enter the system at any point, including their local Community Resource Centre or any other community agency. The worker at the agency first assesses whether or not the client is eligible for the Government of Alberta Housing Eviction Prevention Fund and directs the client there if possible. If the client is not eligible, the worker may then access the Instrumental Funds common intake form through the new Calgary Housing Supports website. They assist the client to complete the form and fax the completed form to whichever agency is deemed most appropriate, based on criteria listed on the website. The agency who receives the form then reviews it to determine whether or not they can assist the client and to what extent. They may add information to the intake form as they verify the client's financial and rental history. If they are unable to assist the client, the agency worker would pass the intake form to the next most likely source of help (another agency within the Instrumental Funds Coordination project). In some cases two agencies may pool funds to meet the needs of the client, where those needs exceed any one agency's capacity.

Strategy #3: Flexible Funding (does not include mortgage assistance)

The Instrumental Funds Coordination project provides **access to a range of funding opportunities**, from loans at the Rent Bank, to a variety of grants. These funds are targeted to eviction prevention, rent and utilities, as well as other issues directly related to housing.

Each program has slightly different criteria for eligibility and maximum dollar amounts. The coordination project allows clients to be directed to the **most appropriate funding source**. In some cases, where maximum funds are exceeded at one agency, another agency will agree to provide additional dollars to meet the client's need.

Since introduction of the Homeless Eviction Prevention fund (HEP), local non-profit organizations have been able to allow **increased flexibility** in their instrumental needs funds. One example might be provision emergency funds for transportation or day care where a client is at risk of losing their employment, which in turn would impact their ability to remain housed. Other areas of support might include moving expenses or changing locks.

One identified funding gap is the inability to provide **emergency funding for mortgage payments**. Sometimes a client's mortgage payment is significantly less than they would encounter in the rental market, so it makes sense to support that client to remain housed rather than allow them to be displaced through foreclosure. However, there is currently no ability within the Instrumental Funds program group to assist with this circumstance. The Advisory Committee will begin to collect information on options for mortgage holders in order to better inform workers of the steps a client might take to resolve their mortgage crisis.

Strategy #4: Access to Information and Eviction Prevention Services

Community Access Protocols were developed and **Community Training** initiatives undertaken to inform workers of available resources and to assist workers in understanding how to access the Instrumental Funds programs on behalf of their clients. Specific instructions for completing the Common Intake Form are now available directly on the website.

This strategy has been assertively implemented. In total **over 50 agencies** have been trained in use of the Common Intake Form.

The Project Coordinator has provided three public orientation sessions on the Common Intake Form with participation from 41 different agencies including CRCs. Orientation information has also been presented at the Immigrant Serving Interagency Network meeting and at the Basic Needs Network meeting.

An additional 11 agencies have received their own individual orientation to the Common Intake Form. The Coordinator is continuing to work on informing community organizations of the protocols for accessing Instrumental Funds.

This project creates linkages at the frontline level between Community Resource Centres, other agencies who are not directly connected to the Homeless Family Sector but are serving their clients, and the Instrumental Funds Coordination project.

Strategy #5: Prevention Targeting (partially implemented)

Research describes this strategy as targeting new homelessness prevention and emergency assistance efforts to the neighborhoods where a disproportionate number of people are seeking shelter (i.e. homeless or at risk of being homeless), or targeting services to specific "at risk" client groups.

This strategy has been informally implemented through strengthening connections with CRCs. In some cases Instrumental Fund programs (e.g. Momentum) specifically target communities and CRCs from which they have tracked higher referral volumes.

Strategy #6: Case Management (informally implemented to some extent)

Research suggests "combining emergency assistance with either time limited or ongoing case management to reduce future risk of homelessness".

Although the Instrumental Funds Coordination project does not identify case management as a formal component of their service delivery model, some "time limited" case management services may be provided informally through individual partner agencies.

Some partners have identified case management as a weak link in the delivery model. While improving access and processing efficiencies, the common intake form has to some extent removed the relational aspect of meeting face to face with a client during an initial assessment. This in turn decreases the opportunity for supportive case management that might help address underlying causes of the immediate financial crisis.

For example, Distress Centre reports that their face-to-face intakes with this client group have decreased by about 50%. This is positive in the sense that clients are now able to access services through a CRC within their own neighbourhood, but also has the potential to disconnect the client from case management opportunities. Momentum is looking for new ways to engage clients in preventative follow-up support programs such as Money Management workshops. The new homeless family sector case management pilot will be housed at the Distress Centre, creating opportunities for coordination with the Instrumental Funds and Basic Needs program.

Strategy #7: Landlord/Tenant Intervention Strategies
(informally implemented to some extent)

Homeless prevention strategies include advocating or mediating between landlords and tenants in order to prevent an impending eviction. This might include negotiating gradual repayment of back rent or mediating other disputes. Other programs work to connect tenants with sympathetic landlords, or to inform tenants of their legal rights and responsibilities.

Although not a formal component of the Instrumental Funds Coordination project, at least one of the partner agencies (i.e. Red Cross) provides a landlord/tenant **advocacy and mediation service** through their Housing Advocates. Advisory Committee minutes identify a service gap in the area of landlord/tenant mediation.

Momentum and CUPS have provided **informational workshops** periodically to explain tenants legal rights and responsibly. This is an area that could be more well developed (e.g. offered on a regular basis). The Calgary Housing Registry Network contains links to the Legal Resource Centre's site on "Laws for Landlords and Tenants in Alberta" which provides clear information on rights and responsibilities for both tenants and landlords.

The Advisory Committee has acknowledged the need to work with landlords and has asked the project coordinator to prepare an **information brochure for landlords** who many want to avoid evicting a tenant who is in arrears. This brochure and a brochure for clients are in development.

Although not a direct service of the Instrumental Funds Coordination group, the Homeless Family Sector is currently in the process of developing a specific **Housing Locator program** that will identify and support landlords willing to rent to homeless families. The Instrumental Funds Coordinator sits on the Housing Locator advisory committee in order to ensure that the projects are working together effectively.

Strategy #8: Shelter Diversion
(link with IFTC in place but no evidence of strategic implementation)

Research suggests shelter diversion as one strategy in preventing homelessness. This strategy is described as “integrating homelessness prevention activities at intake sites for shelters to identify resources to prevent homelessness.”

Although the Instrumental Funds Coordination project does provide a direct link to emergency shelter for homeless families by having a representative from Inn from the Cold on the Advisory Committee, there is **little evidence of a specific strategy for shelter diversion**. IFTC participation on the Advisory Committee has been minimal.

The increased use of 211 for shelter diversion has been discussed. This is a potential area of development for this project.

Strategy #9: Longer Term Support - Housing Subsidies
(not included in this project)

Research suggests moving beyond one-time eviction prevention payments to provision of time limited housing subsidies until families become financially stable. This would prevent repeat episodes of housing crisis situations.

Currently the funds for housing subsidies (for up to two years) are provided through the **New Start program** operated by Calgary Housing Company. Unfortunately, program access is restricted to those clients approved on the Calgary Housing Company wait list. The New Start eligibility criteria and access protocols severely restrict community access, to the point where Instrumental Funds partners do not currently view New Start as a viable program option accessible to their clients.

3.0 Environmental Context

The Instrumental Funds Coordination project has operated in a quickly changing environment, which has created additional challenges. The biggest impact resulted from introduction of the HEP fund in May 2007 (month 3 of the project). By June the number of client applications had dropped significantly to about one third the demand of previous months. This has allowed project partners to add increased flexibility to their fund criteria in some cases and has encouraged the Advisory Committee to rethink their role in the prevention of homelessness.

Another upcoming change to the sector will be the addition of a Housing Locator program and a Case Management program for homeless families. The Instrumental Funds project coordinator is directly involved with both of these projects, so will be in a good position to create active linkages with these new services.

The Immigrant Sector agencies are also involved in a service coordination project aimed at homeless immigrant families. Opportunities exist for closer linkages between the Immigrant Sector and the Homeless Family Sector. The Instrumental Funds Coordination project is aware of the issues faced by immigrant homeless families. Feedback from referring agencies in July 2007 identified a service gap for immigrant families. For example, Inn from the Cold reports that “the only gap is when an immigrant comes over who is sponsored and their sponsor fails and the person cannot work and do not have income.” This is not a situation that can be addressed with one time emergency funds because “they don’t have income and will continue to be in the same situation next month.” The Instrumental Funds project coordinator is working on improving linkages with the Immigrant Sector and has already added the Calgary Immigrant Women’s Association “Find Me A Home” project to the Instrumental Funds website and has consulted with the chair of the Immigrant Sector about ways to create more linkages.

Database development activity will also impact the context within which the Instrumental Funds Coordination project makes future plans. Momentum reports that they will be putting their Rent Bank application on-line. Red Cross is attempting to move its data collection to the HOMES database but is encountering serious limitations, particularly due to the inability of HOMES to store financial data, one of the key functional requirements for Instrumental Funds programs. Decisions will have to be made regarding location of landlord information in the new Housing Locator program as well as information for tracking client progress in the new Case Management program.

These multiple and emerging changes within the environmental context will continue to present challenges as well as opportunities for the Instrumental Funds Coordination project.

4.0 Client Impact

Although the project does not yet have a mechanism for consistent data collection among partners, a rough attempt was made to gather information on overall service demand and client impact.

Data from the Distress Centre 211 line provides one rough measure of community demand for instrumental needs support. During the period March to Sept 2007, the 211 line reports **745 calls** from distressed citizens in the following need categories:

Basic needs	240
Financial issues	238
Shelter/housing	188
Food	79

The HEP fund reports serving **5,933 claims** for either the new resident benefit, eviction prevention or rent shortfall for a combined total of **$5,289,993** provided during the period May 11 to Sept 31, 2007.

Instrumental Funds Coordination partners report serving approximately **501 families** as well as **65 single adults** (i.e. at CUPS and Distress Centre). Within the families there were approximately **853 children** served. As a group the partner agencies gave out more than **$309,000** over the eight- month period.

At the longer term prevention end of the scale the Calgary Housing Company New Start program "has allotted 500 units with a total funding commitment of $2.5 million and will be adding 800 subsidized units in the private market over the next year."[3]

There is general agreement among the Instrumental Funds Coordination project partners that clients are benefiting from improved access to instrumental and basic needs funds. Average survey ratings[4] were 4.6 for "improving client access to funds", and 4.25 for "helping client to remain housed".

[3] Information provided by Calgary Housing Company.
[4] Ratings provided by Advisory Committee members on a 5 point Likert scale (1 very little to 5 to a great extent)

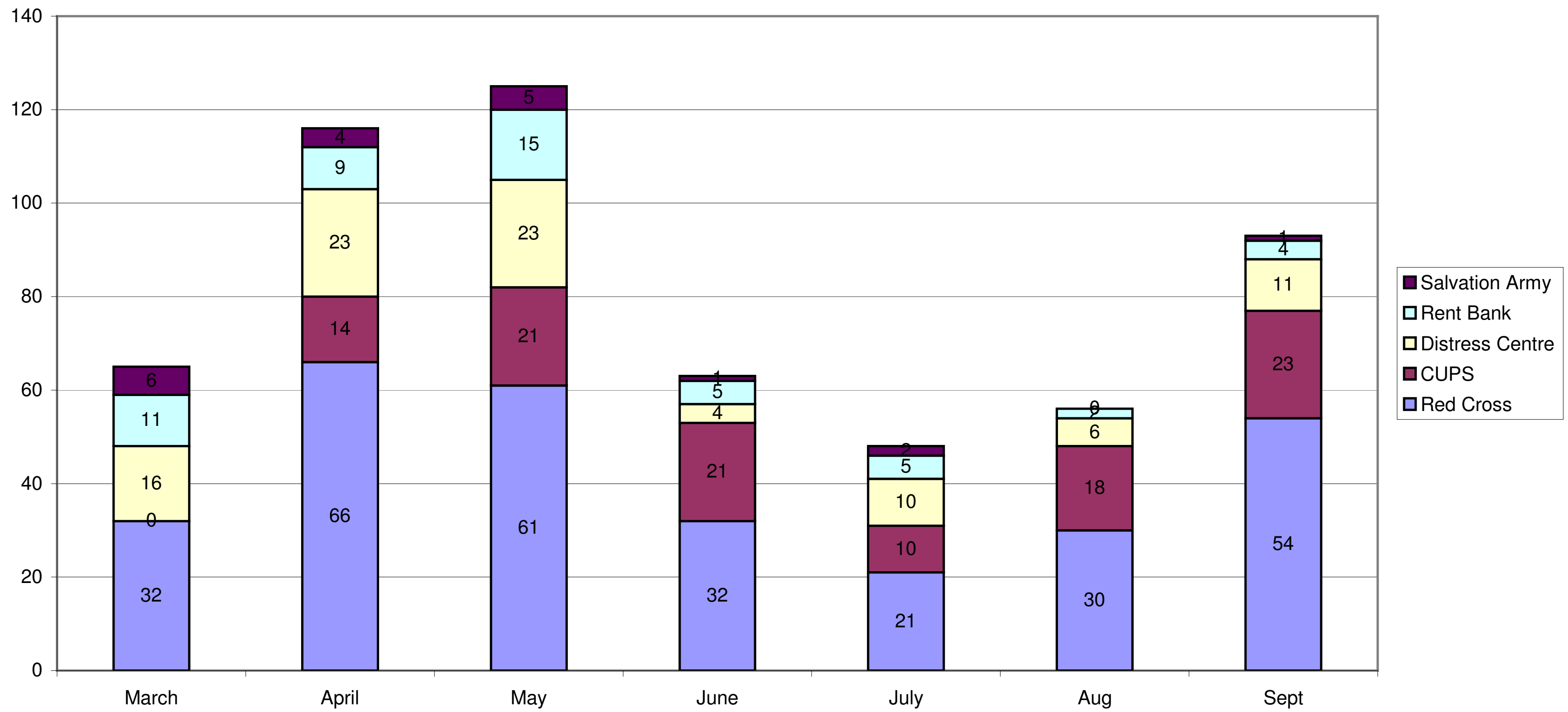
4.1 Service Gaps and Unmet Needs

A number of service gaps and unmet needs have been identified by both referring agencies and by project partners, including:

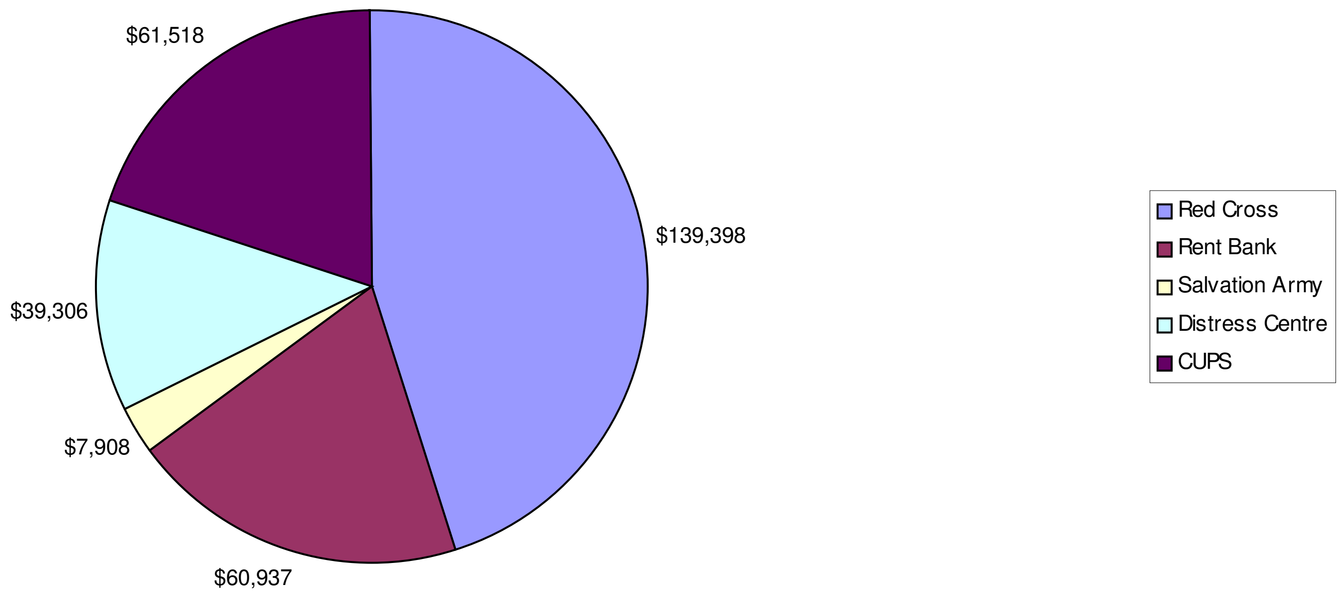
- ability to assist with mortgage payments
- funds for storage and moving costs (although DC and JFS have both recently started offering this funding)
- funds for medications
- phone bills – where phone is required for finding employment
- need for more bus tickets
- LICO criteria doesn't work in Calgary economy
- immigrants and people from other provinces are falling through the cracks – not accessing Instrumental Funds supports to the extent they could

Partners note that efforts to support and stabilize clients could be improved through expanded case management functions, better linking of clients with community services and development of follow-up support.

Instrumental Funds Coordination Project
Total Number of Households Assisted N = 566
March 1 to Sept 30, 2007



Instrumental Funds Provided
To 566 Clients (Families, Couples, Individuals)
During the Period March 1 to Sept. 31, 2007
Total Funds = $309,067



5.0 Feedback on Collaborative Process

Advisory Committee members were interviewed to provide feedback on both the collaborative process and on the project impact.

Roles and Responsibility: Advisory Committee members saw their primary role as having input or advising the collaborative process. Members identified the Distress Centre project coordinator's role as leading the process. Having one person leading and coordinating the project has been advantageous. "Even though it's a collaborative, we still need leadership. When we have a leader the collaborative is more successful."[5]

When partners were asked whether or not the right players are on the Advisory Committee, they generally agreed that having front line staff on the Advisory Committee has facilitated work on the intake form and protocols. "We have the right players at the table, but conversations tend toward front line issues more than is helpful. There is too much focus on details of form changes and not enough discussion of larger systems issues. The committee may "lack of sense of authority for bigger picture decision making."

Working Together Collaboratively: Advisory Committee members reported high levels of effectiveness in their ability to work collaboratively, to problem solve issues and concerns and to plan and implement strategies to meet the goals of the project. One intangible result of the collaborative is the "higher level of trust" that has developed among partners. Members seem generally content with the collaborative process and overall success of the project.

The one critical comment about the collaborative process to date pointed out "some lack of connection to the bigger picture". This partner viewed the work to date as Phase I of the project, keeping in mind that a longer-term goal is to have data to share for sector planning.

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[5] Partner comments from evaluation interview Oct. 2007.

6.0 Feedback on Outcomes

6.1 Client Impacts

Partners notes a number of positive client impacts resulting from the Instrumental Funds Coordination project. For example, partners report that:

- It's a lot easier now for clients to start the process of getting funds
- The client only has to go to one agency for help. They only have to tell their story once.
- Access barriers are reduced because the client can go to a CRC or community agency close to where they live.
- As agencies get to know each other's programs and criteria better, they are better able to process client needs efficiently and the client doesn't get bounced around the system.
- Wait times are much shorter and the situation is resolved much quicker resulting in decreased stress for the client
- Overall the project has had a good impact for clients in crisis

6.2 Agency Impacts

Partners report a number of positive impacts for agencies as well. For example, partners report more efficient processing of client applications.

> "We take so many phone calls and we used to have to go through a person's whole story. Now its much quicker. We can more quickly assess situations and refer people. We can give the client one phone number to get help instead of referring them to four other organizations."

Another significant change identified by some members is the increased levels of communication among partners which has in turn led to increased understanding of one another's' services and a general move from an individual agency perspective to a more holistic systems perspective.

6.3 Challenges and Opportunities

Partners report a number of ongoing challenges that need to be addressed as well as opportunities for improving the service delivery system and planning processes.

There is a need to create better linkages with the rest of the Homeless Family Sector services especially given the emergence of new programs and the changing service environment. In particular, the strategy of **emergency shelter diversion** needs to be more fully developed and strengthened. Some new players such as HEP fund representation need to be added to the Advisory Committee. Connections with the Immigrant Sector and its specialized services need to be better established.

More discussion is needed about the **overall sector impact** of the newly emergent services such as the HEP fund, and the implications for service coordination going forward. How will these new programs affect the overall homeless family sector map, and should existing services be re-designed or rearranged in light of the broader system changes.

Advisory committee membership may need to be expanded as the Instrumental Funds Coordination project moves toward working on issues beyond emergency fund distribution.

One partner would like to the **project scope** clarified to better understand whether the coordination project is focused only on those instrumental funds related to homelessness prevention or whether the broader "basic needs" component is also considered a part of the project.

Existing **Instrumental Funds Coordination systems** (common intake form and website) need further attention and refinement. Partners suggest that there is still work to do around informing referral agencies about services and protocols for accessing those services, especially given the high staff turnover. For example, some partners indicate that referring agencies are still sending the intake form to more than one program.

The **current intake form** could be streamlined to make it more user friendly. For example, the cover page could be used to narrow down which program the client should access and then direct the worker to the appropriate application areas that need to be filled out, or alternatively divert the worker from those sections that are not applicable to the client in question. Perhaps these directing or diverting functions could be built into the existing on-line fill-able form.

The **case management strategy for long term client stability** is currently underdeveloped. Some partners present the need to build relationships with a client because the presenting financial/housing crisis is usually based on other deeper needs and issues. Care must be taken not to depersonalize the client/service interface through use of internet/phone intake processes. There is an opportunity for instrumental fund service providers to provide a "value added" service that client's do not currently receive when accessing HEP and other emergency fund interventions. Workers should be encouraged to take the time to assess the clients needs and provide information, referrals or other options for service. These options might include a case management function, informational workshops (e.g. money management), or connection with other services such as mental health, counseling, employment services, etc. that could provide longer term supports.

Partners admit that there has been little effort directed toward identifying a **process for common data collection** that would facilitate planning for both their own Instrumental Funds services as well the larger homeless family sector picture. Advisory Committee minutes indicate that the topic was raised in June 2007 but the group decided to take a wait and see approach due to a sense that the ten year plan process would address the database issue. In the meantime, planning questions such as “how many immigrant families are accessing instrumental funds” are being raised with no ability to access good information that would be useful to the group in planning improvements. This lack of access to planning data exists in spite of the fact that ten pages of detailed information is being collected for each intake application.

One partner suggests that this **lack of sector level data** (i.e. for instrumental funds programs) means there is no sense of context for their individual agency activity. Some reported a sense of “disconnect” on the data collection situation. For example, at least one agency felt they have been “directed to use the HOMES database”, but there is no connection with the common intake form, or with a common sector level data collection plan that could help them report on instrumental funds activity and impact. In addition, questions are being raised about whether the HOMES database will be useful for these broader data collection and planning purposes in the Instrumental Funds area since there is no place on HOMES database to track what funds are given out to a client for what purpose. The database also lacks the ability to report on instrumental funds impact on the client’s housing situation (i.e. the number of clients who maintained or improved their housing status).

Overall, partner feedback suggests many **opportunities** for future development within the Instrumental Funds Coordination project.

7.0 Conclusions

The Instrumental Funds Coordination project succeeded in solidifying previous collaborative work that had been done to develop a common intake form. Protocols for use of the common intake form have been developed and communicated to referring agencies in the community. A website has been developed to create easier access to instrumental funds.

The service delivery model adopted for this project is a “No Wrong Door” approach which allows broad access points through a coordinated common portal (common intake form and website) which then fans out to the appropriate instrumental funding source. The majority of the work is done behind the scenes by the workers, making both access and the application process much easier and less time consuming for the client.

Over the past eight months instrumental funds for homeless prevention have been provided to **over 500 families** including **853 children**, with a total disbursement of over **$309,000**.

Partners view this project as a first step toward a more fully coordinated and integrated system for homeless prevention. Many opportunities have been identified to more fully develop and enhance the current homeless prevention system.

8.0 Recommendations

The following list of recommendations is intended to point out the opportunities for future enhancements and possible development directions for the Instrumental Funds Coordination as the project moves forward. Please consider these recommendations as suggestions for further exploration and development of the Instrumental Funds Coordination project role within the Homeless Family Sector.

Enhanced coordination and information sharing

8.1 Work on creating a clear plan for how the Homeless Family Services are linked with an overall view to having a fully coordinated and rationale system and to avoid emergence of separate and unlinked services or systems (e.g. Immigrant Homeless Coordination project). For example, a **Homeless Family Sector map** could illustrate how both homeless prevention and homeless response services are linked and accessed.

8.2 More discussion is needed regarding **the impact of the changing service environment** on current Instrumental Funds programs and how those programs might best re-position themselves to address existing and emerging service gaps.

8.3 Develop a **common data collection, data management and reporting system** for the Instrumental Funds Coordination project with a larger objective of creating a basis for these functions across programs in the Homeless Family Sector (i.e. both prevention and response programs).

- Determine what key pieces of common information would be most useful to the Instrumental Funds Coordination group and then design processes for manual data collection and reporting until the database issues can be worked out.

- Tabulate only those data points determined to be useful for sector planning, in a way that protects the anonymity of the client. For example, you can count certain information fields from the intake form (such as marital status, culture, family size) without keeping the client name or other personal or financial information on the database.

- A number of database options should be explored. Some possible ideas might include building a database behind the common intake form website; using existing 211 database features or further developing 211 to allow for automatic data collection from the common intake form; checking with the Calgary Housing Registry Network to see if they could accommodate this function and then moving the common intake form to their site; or working with the Canadian Outcomes Research Institute to determine whether their system could better accommodate the data collection needed by this group of programs.

- Connect with the Ten Year Plan working group to determine if and when they might decide on an appropriate database for the entire homeless sector in Calgary. Explore how Instrumental Funds data collection needs could be accommodated.

- Explore whether Distress Centre might be able to take a larger data coordination role within the Instrumental Funds Coordination project by collating the instrumental funds data and issuing monthly or quarterly aggregate reports to partners or funders for sector planning.

One Prevention Gateway using the No Wrong Door approach

8.4 Improve existing intake processes – look for ways to **streamline the current Common Intake Form** to make it easier for workers to skip sections that are not relevant for their client. Some agencies do not need the extensive information required for Rent Bank applications.

Flexible Funding

8.5 **Address the funding gap for homeowners** (i.e. assistance with mortgage payment) by developing information points and processes that could be used by workers to guide homeowners in exploring their options. If possible, consider broadening instrumental funds access criteria to allow assistance with mortgage payment under specific circumstance that are deemed to warrant this type of assistance.

8.6 Continue to develop emergency funding responses to other identified service gaps such as storage and moving fees.

8.7 Review project scope to **determine how "basic needs" funding fits into the projec**t. If basic needs funding is considered part of this coordination project, then add information and linkages to other basic needs programs (such as Neighbour Links, Women In Need, etc.)

Access to Information and Eviction Prevention

8.8 Develop stronger **linkages with the Immigrant homeless coordination project** and look for ways to link the two coordination projects in order to ensure easy access to immigrant sector expertise and services.

8.9 Web links – ensure that all pieces of the homeless family sector options are well linked in order to fully realize the "No Wrong Door" model.

8.10 Explore the pros and cons of putting the Instrumental Funds common intake form on the Calgary Housing Registry Network in order to facilitate one site for housing services in Calgary. Would this make it easier for workers to find the housing supports their clients need? Explore which of these two existing websites (e.g. Calgary Housing Registry Network or Calgary Housing Support) might be the best location for the new Housing Locators data. Could Calgary replicate something like the Housing Connect website used in Toronto?

8.11 Explore ways to develop and **expand the role of 211** as a source of information and coordination in the Instrumental Funds Coordination project, as well as the Landlord Locator and case management pilots, and other new projects addressing homelessness within the 10 year plan.

Case Management

8.12 **Strengthen case management** functions for Instrumental Funds clients. Develop strategies to increase ability to address client issues beyond one-time emergency financial assistance, especially for those clients with some history of difficulties or with complex situations. For example, workers could be encouraged to take the time to assess the client's needs and provide information, referrals or other options for service. These options might include case management support and follow-up, informational workshops (e.g. money management), or connection with other services such as mental health, counseling, employment services, etc. that could provide longer-term supports.

8.13 Consider tracking repeat requests for instrumental funds support in order to determine what proportion of clients need longer term support to stabilize their situation. These clients could the priority target for case management supports.

Landlord/Tenant Supports

8.14 Increase landlord/tenant support by adding a link on the website to the Legal Resource Centre's site on **"Laws for Landlords and Tenants in Alberta**"

8.15 **Consider adding an** advocacy/mediation role to the case management function for those clients who need longer term support where landlord/tenant relationships are an issue.

Shelter Diversion

8.16 Engage Inn From The Cold and other emergency shelter programs in discussions around development of a specific **"shelter diversion" strategy and protocols.**

For example, one "shelter diversion" strategy might consider using 211 as an initial screening point for both at risk/near homeless families and homeless family referrals, after which the 211 worker could assign a case manager before the client is referred to emergency shelter (i.e. Inn From The Cold). This would create one protocol for referring agencies based on the current Instrumental Funds Coordination protocol. It might also help families to avoid lengthy emergency shelter stays by ensuring early and ongoing case management that could provide families with a range of options.