

# Region of Waterloo STEP Home SROI Roll-Up Report

*The Story Behind the Number: Uncovering Hidden Value in  
STEP Home's Intensive Support Programs*



**June 2013**

**Submitted by SiMPACT Strategy Group**

**Region of Waterloo STEP Home SROI Roll-Up Report**

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**Region of Waterloo**

**SOCIAL SERVICES**

Social Planning, Policy & Program Administration

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Should you have any questions about this report please contact:

Regional Municipality of Waterloo Social Services  
99 Regina Street South, 5<sup>th</sup> Floor, Waterloo, ON N2J 4G6  
Tel.: (519) 883-2117 Fax: (519) 883-2234  
TTY: (519) 575-4608

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## Acknowledgements

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### Project Team Contributors

#### Streets to Housing Stability

- Cambridge Shelter Corporation –Samantha McIntyre and Anne Tinker
- YWCA-Mary’s Place – Kristin Baetz, Stacy Hammond, Casey Maheu, Cathy Middleton, Maria Wallenius

#### Shelters to Housing Stability

- Argus Residence for Young People – David MacLean, Ada Viau, Eva Vlasov
- House of Friendship’s Charles St. Men’s Hostel – Ron Flaming, Brandon Spunar, Christine Stevanus, Shannon Thiessen

### Project Consultants and Report Authors

Stephanie Robertson      President, SiMPACT Strategy Group

Anne Miller                      Team Lead SROI Initiative, SiMPACT Strategy Group

### Region of Waterloo Contributors and Project Support

Nicole Francoeur              Social Planning Associate, Social Planning, Policy and Program Administration

Marie Morrison                Manager, Social Planning

Lynn Randall                    Director, Social Planning, Policy and Program Administration

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Region of Waterloo

Note: The opinions and interpretations in this publication are those of the authors and do not necessarily reflect those of the Government of Canada.

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## Executive Summary

This report has been prepared by SiMPACT Strategy Group for the Region of Waterloo (Region) and its community partners in order to summarize the value created through two of STEP Home’s Intensive Support Programs at four program sites.

### STEP Home

STEP Home is a set of interrelated person-centered programs providing options and support to people approaching or experiencing persistent homelessness in Waterloo Region. It emerged out of *All Roads Lead to Home: The Homelessness to Housing Stability Strategy for Waterloo Region* (Strategy) which was first released in 2007. Originally launched in 2008 as a collection of four programs, STEP Home has since expanded to include 12 programs at 10 organizations across 19 sites.

Through STEP Home, people approaching or experiencing persistent homelessness journey with direct support workers as they move towards housing stability. The STEP Home philosophy acknowledges that it is important to meet each participant ‘where they are currently at’ on their personal journey towards housing stability. This highly person-centred approach is a key ingredient to achieving the value created through STEP Home and is a contributing factor to the transitions that participants experience.

### Background

Although each STEP Home program may have a different funding source, they are all largely funded through the Region. The idea of conducting an SROI analysis emerged as a result of interest by the Region and its community partners. As interest developed, conducting an SROI analysis was proposed as a special evaluation project of the STEP Home Collaborative.

*It is amazing what happens when we ask people what they want. That is how people are inspired to make change in their own lives with the support of STEP Home.*

*–Direct Support Worker*

Subsequently, in April 2011 there was a call for expressions of interest put out to directors and managers of STEP Home agencies for voluntary participation in the development of an SROI case study. As a result of receiving more interest than this project could accommodate, the Region moved forward to identify two sites of the Streets to Housing Stability (*Streets*) program (i.e., Cambridge Shelter Corporation and YWCA-Mary’s Place) and two sites of the Shelters to Housing Stability (*Shelters*) program (i.e., Charles St. Men’s Hostel and Argus Residence for Young People) to pilot the SROI methodology.

Both *Streets* and *Shelters* are Intensive Support Programs of STEP Home with participants engaging in the programs from one of two starting points. They are either experiencing unsheltered homelessness where people may rest, sleep or stay in a variety of temporary spaces such as parks, sidewalks, stairwells, under

bridges, abandoned buildings, cars, or doorways<sup>1</sup> or are accessing emergency shelter services. Both programs provide intensive, flexible support to people who are either approaching or experiencing persistent homelessness.

Both programs operate with a direct support worker to participant ratio at 1:10. This ensures the provision of person-centred and intensive support to participants. Although *Streets* and *Shelters* share a similar approach and both rely upon the direct support worker to engage with participants, the STEP Home Collaborative has identified four key distinctions between the two programs, which are described in detail in Appendix A. In brief, these are:

- Participant starting point
- Likelihood of future source of income
- Intensity of direct support worker support required, and
- Different possibilities when considering future community inclusion.

## Methodology

The SROI methodology is an approach to understanding and managing the value of the social, economic and environmental outcomes created by an activity or an organization. It is based on a set of principles that are applied within a framework. SROI includes material value created for all stakeholders, in order to ensure that a fuller picture of value is presented. The fuller picture enabled by SROI influences resource allocation, program design, evaluation processes and communication of results. Since evaluation tools were not yet in place to acquire evaluative outcomes data, the STEP Home SROI analyses were done as forecasts of value creation, drawing upon existing data and knowledge.

## Findings

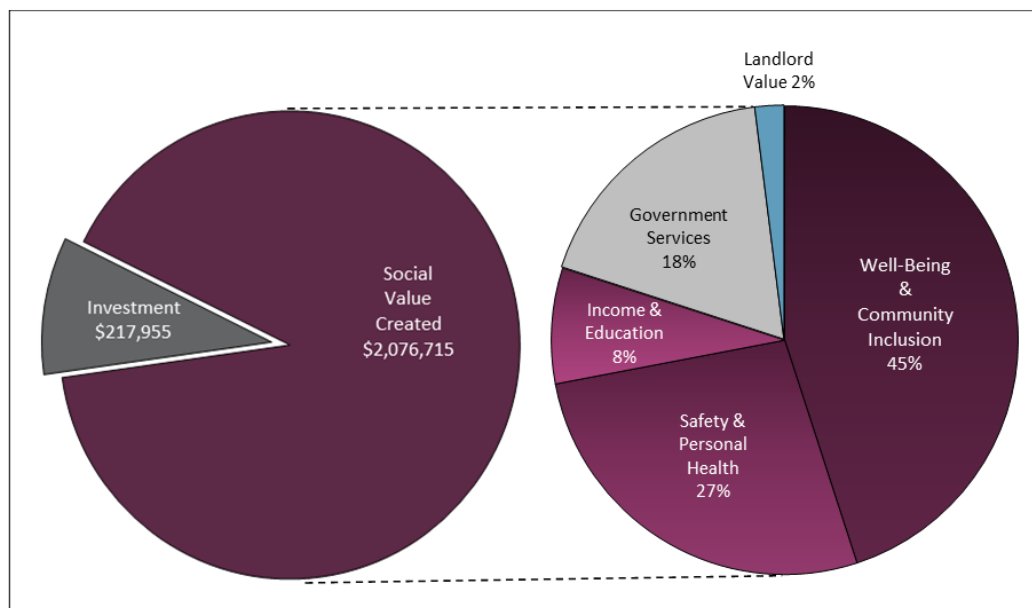
The review of the two sites of the *Streets* and two sites of the *Shelters* to Housing Stability programs brings forward the value created for stakeholders across the Region as participants' risk of victimization, food insecurity and lack of income are addressed, and as system access barriers and social isolation are diminished. While in the most extreme cases, direct support workers might invest 12-18 months into relationship-building with a future participant before that individual decides to become involved in the program, the results presented in this roll-up report illustrate the value of the Region's investment to achieve STEP Home outcomes. This value ranges between \$8.25 and \$10.64 of social value created for every dollar invested, with an average value across the four program sites of **\$9.45 in social value created for every dollar invested**. This value holds, even if the participants take time to begin to trust that STEP Home can offer them a path towards housing stability.

The range of value created is explained in detail in the full report. The range represents the differences in participant demographics (e.g., women, men, youth) as well as the level of entrenchment in homelessness. The ranges also account for differences in program intensity and the timeframe over which they are delivered (see Appendix A for program differences).

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<sup>1</sup> Social Planning, Policy and Program Administration (2012). All roads lead to home: The homelessness to housing stability strategy for Waterloo Region – Policy framework. Waterloo, ON: Regional Municipality of Waterloo.

**Total Investment to Social Value Created in Four STEP Home Intensive Support Programs (2011)**



The work done to evaluate each program using the SROI methodology brought forward value that the Region and the STEP Home programs knew was present but had not yet been fully expressed. The approach taken focussed on the impact upon participants that resulted from their improved housing stability. The value of avoiding alternative outcomes that would otherwise have been experienced by participants was also included.

The SROI methodology captured the value of investments in the STEP Home Intensive Support Programs by considering the impact derived from improved housing stability. It also incorporates the value of cost-avoidance associated with alternative outcomes that, in the absence of the intervention, may have otherwise resulted. This valuation includes the avoidance of crisis and emergency supports, as well as health, justice and social services. In identifying and expressing material value, the SROI incorporates value to participants, government services of various types and other stakeholders. The end result is a clear expression of the value created through the Region’s investment in the STEP Home Intensive Support Programs. For each of the four program sites that participated in the study, the SROI enhances their ability to understand the social value created through their work and communicate it to others.

There are three recommendations flowing from the SROI results. First, it is recommended that the Region consider investing in the capacity of each STEP Home Intensive Support Program analyzed in continuing to use SROI methodology established in this study. This will also help the projects to move the analyses from forecast to evaluation.

Next, it is recommended that each STEP Home Intensive Support Program analyzed incorporate the learnings from this study to support stakeholder engagement at each site on an ongoing basis. By involving stakeholders in the SROI process, programs gain a deeper understanding of what stakeholders value and can tailor programming to stakeholders to achieve the results that matter the most to them.

Finally, the Region should also consider expanding the use of SROI methodology to measure social value creation through its umbrella of STEP Home programs. There is a remarkably high level of social value created through STEP Home, for a small investment. This is an excellent example of the value of investing in programs to prevent or end persistent homelessness.



## 1. Introduction

### 1.1 Report Objective

This report was prepared by SiMPACT Strategy Group in response to the interest by the Region of Waterloo and the STEP Home Collaborative in demonstrating the value of working to end persistent homelessness. The Social Return on Investment (SROI) methodology was used to analyze the social value of programs delivered at four sites which were considered representative of STEP Home’s Intensive Support Programs. The report is a pilot special evaluation project and does not replace other specific data requirements as determined by the respective funding sources of each of the STEP Home programs.

### 1.2 STEP Home Background

STEP Home is a set of interrelated person-centered programs providing options and supports to people approaching or experiencing persistent homelessness in Waterloo Region. STEP Home emerged out of *All Roads Lead to Home: The Homelessness to Housing Stability Strategy for Waterloo Region (Strategy)*. *All Roads Lead to Home* was first released in 2007, and continues to operate as a “signature program” of the updated Strategy (2012). Originally launched in 2008 as a collection of four programs, STEP Home has since expanded to include 12 programs at 10 organizations across 19 sites.

*People say that it feels good to know that someone sticks up for you and someone cares about you – this can change a person’s life.*

*–Direct Support Worker*

STEP Home’s direct support workers support people approaching or experiencing persistent homelessness by helping them move towards housing stability. The STEP Home philosophy acknowledges the unique position of each participant on their personal journey towards housing stability. This highly person-centred approach is a key ingredient in the value created through STEP Home.

As locally defined, a variety of scenarios are used in Waterloo Region to define the circumstances when an individual is **approaching or experiencing persistent homelessness**. These are:

- Homelessness is considered to be part of “normal” life and skills are oriented to surviving on the streets rather than living in more conventional housing; and/or
- A longer term pattern of cycling between experiencing homelessness and being at-risk of housing loss is present, relative to the person’s age (e.g., for youth - longer term may be measured in weeks, not years) ; and/or
- A person may not be strongly connected to the idea of more conventional housing (e.g., family home, housing covered under the RTA (2006) or Long Term Care); and/or
- It would be challenging to find another suitable alternative if the current housing was lost; and/or
- A longer period of time may be needed to build a trusting relationship with another person; and/or
- The extent and/or complexity of a person’s health issues has exhausted all existing resources; and/or

- A person has either a large number of disconnections with community programs and/or extensive use of emergency services.

STEP Home direct support workers invest the time necessary to build trusting relationships with participants. This support makes the journey towards housing stability achievable. Direct support workers also help participants to define the ways in which they will achieve a sense of belonging or ‘community’. For example, sometimes the first housing experience does not become longer term and direct support workers are able to leverage the established relationships that they have developed with participants in order to continue to support them in another way. The idea is to provide supports to help further participants along their journey towards housing stability while navigating any gaps and system barriers that would otherwise contribute to persistent homelessness.

### 1.3 Streets to Housing Stability and Shelters to Housing Stability – Program Overview

Four program sites of two STEP Home programs were selected to participate in a Social Return on Investment (SROI) analysis from among a number expressing interest. While a limited number of STEP Home programs were able to be included for this particular study, the potential exists to conduct additional case studies in the future due to the level of interest expressed. The four sites chosen represent two STEP Home Intensive Support Programs: the Streets to Housing Stability program (referred to as the *Streets* program in this document); and the Shelters to Housing Stability program (referred to as the *Shelters* program in this document).

*The staff have done more for me in two years than my family has my whole life.*

*–Participant*

Participants STEP Home begin from one of two starting points defined as either being within (*Shelters*) or outside (*Streets*) of the shelter system. Both programs provide intensive, flexible support to people and maintain a direct support worker to participant ratio of 1:10 in order to ensure person-centred and intensive support to participants. Although *Streets* and *Shelters* share a similar approach and both are reliant upon the role of the direct support worker to engage with participants, there are key distinctions between the two programs. The STEP Home Collaborative has identified four key distinctions, which are described in detail in Appendix A.

In brief, these are:

- Participant starting point
- Likelihood of future source of income
- Intensity of direct support worker support required, and
- Different possibilities when considering future community inclusion.

## 2. Methodology – Social Return on Investment (SROI)

### 2.1 The Social Return on Investment (SROI) methodology

The Social Return on Investment (SROI) methodology looks beyond cost-benefit analyses to provide a more holistic picture of social value. Social value includes the value experienced by all stakeholders including the individuals participating in the program<sup>2</sup>.

The SROI methodology differs from traditional cost-benefit analysis by including intangible value, value from a stakeholder’s perspective, and the value of alternative outcomes. An SROI combines quantitative, qualitative, and where possible, participatory research techniques to develop a clear understanding of the value of change in relation to non-investment (status quo). The methodology values not only the changes experienced by core or immediate stakeholders but also acknowledges that these changes can have a ripple effect, creating value for other stakeholders.

Like accounting, SROI is a principles-based approach, and the development of a full analysis generally follows a set of six specific stages or steps (outlined below in relation to this study). The principles and these steps are outlined in *A Guide to Social Return on Investment*, acknowledged internationally as the guiding document on SROI. The Guide further outlines the methodology and application of an SROI. SiMPACT’s approach and all SiMPACT Tools are sanctioned by the international SROI Network.

The six SROI steps in relation to this study involved:

1. *Establishing scope and identifying stakeholders.* This step involved looking at the timeframe of the analysis (how far into the future will the analysis consider change, what timeframe of investment will be considered); determining which stakeholders are “material” (relevant) to the analysis; outlining the theory of change behind the initiative; understanding the general implications of the changes that are expected.
2. *Mapping outcomes.* This step involved carefully considering the relationship between inputs (STEP Home funding), outputs (evidence of participation and reach into the targeted audience), and outcomes (stakeholder change). The changes experienced by different stakeholders were considered in a comprehensive way, and the interaction between the changes mapped in detail.
3. *Evidencing outcomes and giving them a value.* This step involved seeking financial proxies to represent value to each stakeholder of the outcomes that were determined in step 2. Some financial proxies were previously researched through academic studies, while others were available through the SROI Canada Financial Proxy Database, and still others were determined in a local context (e.g., value of food security or income assistance in the Region of Waterloo).

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<sup>2</sup> Refer Resource List provided in Appendix C for full details.

4. *Establishing impact.* This step involved considering what other elements are part of the change experienced by stakeholders including the change that would have happened anyway, the displacement of other positive activity, the change attributable to others, and the amount of drop off expected over time. This was based on research as well as estimations from direct support workers and it helps to avoid over-claiming of the value created.
5. *Calculating the SROI.* This step involved forecasting the number individuals experiencing outcomes due to funding provided through the Region of Waterloo and the value associated with these outcomes. Direct support workers were engaged in determining these estimations.
6. *Reporting, using, embedding.* This step involved the creation of this SROI report, as well as SROI Executive Summaries for each individual program. Going forward the full analysis (which has been provided in an Excel Workbook format) can be used for planning and process management (evaluation) purposes and provides transparency into the analysis conducted. The report should be shared with stakeholders to ensure the validity of assumptions made.

An SROI analysis can be evaluative (definitive value statement) or a forecast (projected value statement, provided evaluation results are as expected). While both approaches are equally valid and powerful, there are few policies, projects or organizations that can conduct an evaluative SROI to begin. This is because the SROI methodology includes expression of value that goes beyond what is typically captured through routine program monitoring and reporting. Since evaluation tools were not yet in place to acquire evaluative outcomes data, the STEP Home SROI analyses were done as forecasts of value creation, drawing upon existing data and knowledge. Throughout the process, direct support workers and managers were consulted to confirm any estimations that were made. SROI analysis involves a number of judgements about the most appropriate financial value to represent the social outcomes experienced by different stakeholders (financial proxies).

*My worker and I care for each other. Sometimes we even go for coffee. We are kind of like friends with boundaries.*

*–Participant*

While the internationally recognized principles for SROI analysis are applied in all cases, many decisions still have an element of subjectivity. While there is this element of subjectivity in the process, every decision made reflects the most conservative outcome, in order to ensure that program value is not over-claimed (e.g. the lowest reasonable value financial proxies were used). The final analyses consistently represent the *minimum* value created. In order to ensure transparency, detailed notes are included in the SROI analysis files on every decision that is made. These notes include data sources and research sources, and indicate where conservative estimations based on program experience have been included. The risk that these estimations and decisions are not 100% accurate has been addressed through the application of a 22% discount rate to the entire analysis, where the rate the Government of Canada would use for a low-risk

investment in social change would typically be much lower at 8%.<sup>3</sup> By using a much higher discount rate, users of the SROI study can be assured that the results are never likely to be over-valued.

The SROI methodology seeks to understand the changes brought about by the program that are of value to stakeholders. Stakeholder engagement is used to determine and value outcomes. By involving stakeholders in the SROI process, programs gain a deeper understanding of what stakeholders value and can tailor programming to stakeholders to achieve the results that matter the most to them. Stakeholder involvement leads to performance and process improvement in programs.

## 2.2 The SROI Methodology as Applied to STEP Home

Four SROI case studies were developed to derive a preliminary picture of the range of values created through STEP Home. The process involved a collaborative approach including at least one face-to-face meeting with project teams to ensure that the outcomes attributed were valued by and represented the experience of stakeholders. The project team included SiMPACT Strategy Group, Region of Waterloo staff, direct support workers and managers/directors from each of the four sites. Each site's SROI analysis is summarized in an individual executive summary in Appendix D. The details and calculations of each analysis, including the impact map, financial proxies, and notes, are available for each project in the form of a SiMPACT SROI Workbook and can be shared upon request.

The SROI is intended to enhance the ability of projects to identify and communicate the social value created through their work. The *Streets* programs selected to participate were Cambridge Shelter Corporation and the YWCA. These programs engage with individuals who often come from unsheltered situations for example living on the streets. The two agencies operating the *Streets* programs offer services beyond those in STEP Home. The Cambridge Shelter Corporation also operates a drop-in program, an emergency shelter for adult men and women and supportive housing programs. The YWCA operates Mary's Place, an emergency shelter for women, families and transgendered persons experiencing homelessness as well as supportive housing. The *Shelters* programs selected to participate operate emergency shelter services. The House of Friendship's Charles Street Men's Hostel is a shelter for adult men and Argus Residence for Young People is a shelter serving youth.

The four SROI case studies allowed the exploration of a broader use of indicators to illustrate the value created through measures to address persistent homelessness. The studies capture the value for individuals in different life situations (e.g., vulnerable women, individuals who have been living without housing for a long period of time, young men and women, etc.). Appendix A provides details on the difference between the *Streets* and *Shelters* programs. Appendix D provides individual case detail from each individual program in executive summary format.

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<sup>3</sup> See: Boardman, A., Moore, M. & Vining, A. (2010). The Social Discount Rate for Canada Based on Future Growth in Consumption. *Canadian Public Policy*, Vol. 36 No. 3. Should these resources also be included in reference list? See also: Appendix D for standard considerations related to the determination and application of the discount rate.

### 3. Challenges in the Study

Social Return on Investment (SROI) goes beyond a ratio of investment to overall social value created to tell a compelling story of the outcomes achieved from the perspective of the stakeholders. Ratios are calculated as a *minimum* estimate of financial value created through the investment in STEP Home Intensive Support Programs. In most situations, the full social value is likely much higher.

#### 3.1 Difficulty fully valuing intangibles

The challenge of valuing intangibles is always present in SROI analysis. While this is addressed to some extent by looking at contingent valuation opportunities and by using the Quality Adjusted Life Year (QALY)<sup>4</sup> as a financial proxy, the total value of change to individuals participating in social programs has the potential to be under-valued. Personal elements like hope, positive outlook and attitude along with other intangible outcomes created by the program cannot be captured with certainty in financial terms. For this reason, the overall social value is likely to be *higher* than the value represented by the SROI ratio.

#### 3.2 Estimations and application of discount rate

While actual program data contributed by direct support workers closest to participants was comprised primarily of estimates, each project team offered significant experience made possible through their strong relationship with participants. A survey involving direct support workers was used to gather data on participant outcomes dating back to 2011. The limitations posed through timing and project resources made the collection of pre/post-test evaluation data direct from participants challenging. The absence of specific pre/post evaluation tools creates an opportunity for error because of the need for estimates. In order to compensate around the risk of inaccuracies, the discount rate for all case studies was increased to 22% to ensure the most *conservative* estimate was taken for each program and to ensure that the values calculated were not over claimed (e.g., all “maybe” answers were counted as “no”).<sup>5</sup>

#### 3.3 Stakeholder perspective

SROI methodology requires the involvement of stakeholders to help direct the mapping and valuing of outcomes. While stakeholders were represented in this study, the methodology does call for a higher level of involvement than was made possible through the process. Limitations in stakeholder involvement were due in part to the timing of the analysis, but were also due to ethical considerations surrounding the vulnerability of the study group.<sup>6</sup> In order to compensate for the limited stakeholder

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<sup>4</sup> Donaldson, C. *et al.* (2011). The social value of a QALY: Raising the bar or barring the raise? *BMC Health Services Research*. 11:8. Available online at: <http://www.biomedcentral.com/1472-6963/11/8>

<sup>5</sup> See: Boardman, A., Moore, M. & Vining, A. (2010). The Social Discount Rate for Canada Based on Future Growth in Consumption. *Canadian Public Policy*, Vol. 36 No. 3.

See also: Appendix D for standard considerations related to the determination and application of the discount rate.

<sup>6</sup> See for example, York University Office of Research Ethics. (2012). Guidelines for Conducting Research with People Who are Homeless. Available online at: <http://homelesshub.ca/Library/Guidelines-for-Conducting-Research-with-People-who-are-Homeless-48837.aspx>

involvement, research from the Region of Waterloo and other sources were incorporated into the analysis along with the significant involvement of the direct support workers.

In terms of the timing, the establishment of the STEP Home Participant Advisory Group (PAG) was in its infancy during the data collection process. Despite this limitation, the STEP Home PAG did have the opportunity to provide feedback on the SROI methodology and was provided with updates related to the study's progress throughout the process. The study's access to direct support workers as a source of input was of great benefit for their more immediate connections to and understanding of participants. To this end, a great deal of time was invested in engaging the direct support workers in the development of the model used to value program investment. For example, over September-October 2011, Region staff spent two days with the *Shelters* direct support worker at Cambridge Shelter Corporation and the direct support worker at Charles St. Men's Hostel in order to deepen understanding around how the program operates on a day-to-day basis. These "shadowing" experiences were valuable because they informed the development of the forecast models in a way that stakeholder involvement can now be used to inform the ongoing testing of the models and inform program improvement.

While the three challenges listed above do present some limitations in the interpretation of the study's results, the SROI ratios presented as part of the key findings should therefore be taken to represent the *minimum* calculation of the social value created through these STEP Home programs.

## 4. Key Findings

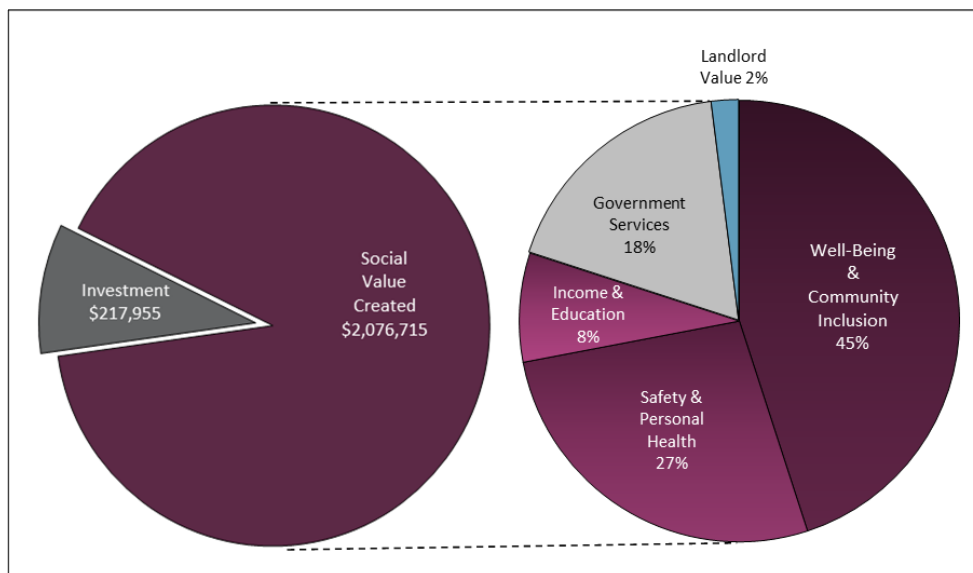
### 4.1 Social Value Creation Through STEP Home

While each program had different nuances in terms of participant profiles, location of services, and the specific activities that take place (see Appendix D for individual program details), the SROI methodology has demonstrated that a significant amount of value is created through each of the STEP Home programs. As *Figure 1: Total Investment to Social Value* created illustrates, there is a significant level of value created by the four program sites that represents not only the value of outcomes achieved, but also the value of the avoidance of the alternative outcomes that otherwise would have occurred should these individuals have continued moving towards a persistently homeless situation.

*I would be dead if it  
wasn't for this  
program.*

*–Participant*

**Figure 1: Total Investment to Social Value Created**



The social value, created through a one-year investment of \$217,955 in the STEP Home Intensive Support Programs returned between \$8.25 and \$10.64 in social value for every dollar invested, with an **average value across the four programs of \$9.45**. *Table 1: Overview of SROI* provides further details of the SROI analysis of the four program sites and shows how different value is created when two different approaches are used to address the variety of real-life and demographically-specific situations faced by people experiencing persistent homelessness.

**Table 1: Overview of SROI Results, Streets and Shelters to Housing Stability Programs**

Program	Streets to Housing Stability	Shelters to Housing Stability	Streets to Housing Stability	Shelters to Housing Stability	Total across four Intensive Support Programs
Program location	Cambridge Shelter	Argus Residence for Young People	YWCA- Mary's Place	Charles St. Men's Hostel	Multiple locations
# Participants	13	12	14	21	60
Investment value	\$51,258	\$50,000	\$63,724	\$52,973	\$217,955
Total present value	\$422,953	\$468,454	\$621,491	\$563,817	\$2,076,715
SROI Ratio	8.25 : 1	9.37 : 1	9.75 : 1	10.64 : 1	9.45
Social value per dollar invested	<b>\$8.25</b> for every dollar invested	<b>\$9.37</b> for every dollar invested	<b>\$9.75</b> for every dollar invested	<b>\$10.64</b> for every dollar invested	Average value of <b>\$9.45</b> for every dollar invested



Program	Streets to Housing Stability	Shelters to Housing Stability	Streets to Housing Stability	Shelters to Housing Stability	Total across four Intensive Support Programs
Positive outcomes from Intensive Support Programs	<ul style="list-style-type: none"> <li>• Movement towards housing stability</li> <li>• Increased sense of hope</li> <li>• Increased sense of safety</li> <li>• Decreased problematic substance use</li> <li>• Decreased justice system involvement</li> <li>• Increased income and access to community resources</li> <li>• Increased education</li> <li>• Improved physical health/basic needs met</li> <li>• Decreased unaddressed mental health concerns</li> <li>• Increased community inclusion/decreased social isolation, stigmatization, and marginalization</li> <li>• Increased independence/personal capacity/self-esteem</li> <li>• Improved relationships with landlords</li> </ul>				
Types of social value created	<ul style="list-style-type: none"> <li>• Value associated with increased well-being and community inclusion</li> <li>• Value of increased safety and personal health</li> <li>• Value of reduced government service use</li> <li>• Value of increased income/education</li> <li>• Value of landlord participation</li> </ul>				

The range in values should not however be interpreted to mean that any one particular *Streets* or *Shelters* program is more valuable or effective than another. As *A Guide to Social Return on Investment* (2012) published by the International Social Return on Investment Network cautions: “it is not appropriate to compare the social return ratios alone...an organization should compare changes in its own social return over time and examine the reasons for changes.” Nevertheless, it is still useful to identify some of the reasons why four different, yet similar, programs analyzed through this study would have different ratios. A number of factors have contributed to these differences including:<sup>7</sup>

- *Number of stakeholders experiencing change.* Since the *Streets* programs address homelessness amongst individuals who have been living on the streets, often unsheltered, for a very long period of time, the length of time for engagement of participants is longer, and fewer individuals move through the program each year. This is part of the reality of the situation facing these individuals, and does not reflect on the value of these programs, however, with fewer individuals moving through the program, fewer individuals have the opportunity to achieve the intended outcomes, potentially lowering the SROI ratio that is calculated.

<sup>7</sup> Also see Appendix A for an explanation of the differences between the *Streets* and *Shelters* programs; See Appendix B for the executive summaries of each individual analysis; See section 4.5 for sensitivity tests of the SROI ratios

- *Timeframe of change.* The ratios presented have also been affected by the timeframe of the change experienced by stakeholders. Again, the longer period required to engage *Streets* participants means that the social value created takes longer to achieve. Conversely, some programs carry an extension of value well into the future because of the importance of early intervention, for instance programs such as the Argus Residence for Young People that aim to assist youth to achieve the skills necessary in order to avoid a cycle of homelessness that extends into adulthood.
- *Participant demographics.* The programs analyzed have different target stakeholders that vary by age and gender. Differences in demographics lead to differences in the experience of homelessness. Consequently, the amount of types of social value created by the programs varies. For example, gender may influence the risk of exposure to violence or sexual exploitation. In a similar way, the age of an individual experiencing homelessness affects the types of risk exposure as well as the potential to change a life path.

*There has never been a participant in this program who was not interested in giving back to the community in some way; usually through volunteering or paid employment.*

*–Direct Support Worker*

These are just a few examples of the nuances in programming that affect the calculation of the SROI ratios presented in this report. The SROI ratios calculated should not be compared program to program or site to site. Instead, the ratios should be used to demonstrate the considerable amount of social value created by the STEP Home approach to addressing homelessness. This is further illustrated by Figure 1.

## 4.2 Sensitivity Testing

For the models presented in this report, a number of sensitivity tests were necessary. These tests represent the “[p]rocess by which the sensitivity of an SROI model to changes in different variables is assessed”<sup>8</sup> and help to ensure that the SROI ratios represent the *minimum* value of the programs analysed. These tests have also been used in this study to help understand the range of value created through the four STEP Home Intensive Support Programs analysed. The following represent two examples of the sensitivity tests conducted through the SROI study.

- *Same demographic (men), different programs, different number of stakeholders.* If we consider the Cambridge Shelter Corporation and Charles Street Men’s Hostel to have participants with similar demographic characteristics, what might explain the difference between the ratios (8.25 : 1 in the case of the former, and 10.64 : 1 in the case of the latter)? While the participant demographics may seem similar, the experience of the participants in terms of their entrenchment in homelessness is different, resulting in one set of participants participating in the *Streets* program and the other set of

<sup>8</sup> *A Guide to Social Return on Investment*, 2012

participants participating in the *Shelters* program (see Appendix A for a detailed breakdown of the program differences). This results in the number of participants being lower in the situation of Cambridge Shelter Corporation than it is for Charles Street Men's Hostel. However, if we considered a scenario where both programs were able to engage the same number of stakeholders, what would the ratios look like? If the Cambridge Shelter Corporation's analysis model is changed to include the same number of participants as Charles Street Men's Hostel (21), then the ratio increases to 10.74 : 1. Adjusting for participation rate, the new Cambridge Shelter Corporation ratio of 10.74 : 1 becomes very similar to the Charles Street Men's Hostel program. Here, both ratios indicate that each of the two programs are valuable, and that the difference in ratios is largely due to situational aspects of the number of participants moving through each program.

- *Same program, same number of stakeholders, different demographics.* If we then consider the two *Streets* programs at Cambridge Shelter Corporation and YWCA-Mary Place, there is once again a difference between the ratios (8.25 : 1 in the case of the former and 9.75 : 1 in the case of the latter). In these situations, while the participants are all involved in the same program, and each has a similar number of participants (13 and 14 respectively), there are demographic differences influencing the two SROI ratios. Specifically, all of the individuals participating in the *Streets* program at the YWCA-Mary's Place site are women or trans-identified women with the potential to experience homelessness differently than STEP Home participants from the Cambridge Shelter Corporation because they are all men. If we excluded the social values that relate specifically to the experience of women and trans-identified women (e.g., sexual assault) what would the ratios then look like? If the YWCA-Mary's Place analysis model did not include these gender-related values, then the ratio decreases to 8.45 : 1. As the Cambridge Shelter Corporation's ratio was calculated at 8.25 : 1 this sensitivity test indicates that the *Streets* programs at these two sites are achieving very similar results.

#### 4.3 Social Value Creation Across Four STEP Home Program Sites

The result of the SROI analysis for each of the programs is summarized below. Appendix D contains the executive summaries of each of the four individual case studies and Table 2 contains a summary of the financial proxies used.

##### *Cambridge Shelter Corporation*

In 2011, 13 individuals participated in the program. In total, 24 outcomes were identified and valued using 19 financial proxies. The total present value of investing in the program was calculated as \$422,593. With a total investment in the program of \$51,258 the final SROI ratio was calculated as **8.25 : 1**. This indicates that for every dollar invested in the *Streets* program at Cambridge Shelter Corporation, **there is \$8.25 in social value created by the program.**

### *Argus Residence for Young People*

In 2011, 12 youth participated in the program. In total, 19 outcomes were identified and valued using 24 financial proxies. The total present value of investing in the program was calculated as \$468,454. With a total investment in the program of \$50,000, the final SROI ratio was calculated as **9.37 : 1**. This indicates that for every dollar invested in the Shelters program at Argus Residence for Young People, **there is \$9.37 in social value created by the program.**

### *YWCA- Mary's Place*

In 2011, 14 individuals participated in the program. In total, 19 outcomes were identified and valued using 23 financial proxies. The total present value of investing in the program was calculated as \$621,491. With a total investment in the program of \$63,724 the final SROI ratio was calculated as **9.75 : 1**. This indicates that for every dollar invested in the *Streets* program at the YWCA-Mary's Place, **there is \$9.75 in social value created by the program.**

### *Charles Street Men's Hostel*

In 2011, there were 21 individuals who participated in the program. In total, 21 outcomes were identified and valued using 23 financial proxies. The total present value of investing in the program was calculated as \$563,817. With a total investment in the program of \$52,973, the final SROI ratio was calculated as **10.64 : 1**. This indicates that for every dollar invested in the *Shelters* program at Charles St. Men's Hostel, **there is \$10.64 in social value created by the program.**

## **4.4 Financial Proxies**

While the financial proxies used to calculate the SROI ratios were similar across the four projects, Table 2 illustrates the variation in proxies selected as a result of the differences in outcomes and service delivery between the two program types (*Streets* or *Shelters*) and also to account for differences in participant demographics (e.g., women, men, youth).

**Table 2: Financial Proxies Used in the Social Return on Investment (SROI) Analysis**

<b>Proxy</b>	<b>Cambridge Shelter Corporation</b>	<b>Charles Street Men's Hostel</b>	<b>Argus Residence for Young People</b>	<b>YWCA-Mary's Place</b>
*Note: Specific proxy values and calculations are available in individual case study SiMPACT SROI Workbooks (available upon request). All proxy sources cited in Appendix C Resource List)				
Value of shelter, and possibility of stable housing	X			
Cost of suicide	X	X	X	X
Value of healthy food for one adult per week	X	X		X
Monthly value of Ontario Works	X	X	X	
Monthly value of Ontario Disability Support Program	X	X		X
Work at minimum wage		X	X	X
Lost earnings opportunity avoided			X	
Reduced expense from cheque cashing services				X
Individual counselling session	X			
Cost of pain and suffering due to assault	X	X	X	X
Cost of pain and suffering due to sexual assault				X
Cost of pain and suffering per robbery victim			X	
Personal value of addressing addiction	X	X	X	X
Value of QALY (Quality Adjusted Life Year)	X	X	X	X
Value of volunteering	X	X		X
Private /Intangible Cost of dropping out of high school		X	X	X
Cost of dental issues				X
Cost of child abuse to survivors				X
Emergency shelter cost	X	X	X	X
Cost of re-housing		X	X	X
Cost of psychiatric treatment	X	X	X	X
Cost difference in health care between homeless and non-homeless	X	X	X	X
Addictions treatment facility - Toronto average	X	X	X	X
Not involved in justice system	X	X		
Police investigations			X	

<b>Proxy</b>	<b>Cambridge Shelter Corporation</b>	<b>Charles Street Men's Hostel</b>	<b>Argus Residence for Young People</b>	<b>YWCA-Mary's Place</b>
*Note: Specific proxy values and calculations are available in individual case study SiMPACT SROI Workbooks (available upon request). All proxy sources cited in Appendix C Resource List				
Average property crime cost -mischief (vandalism)			X	
Average property crime cost - breaking and entering			X	
Cost of shoplifting			X	
Public cost of dropping out of high school		X	X	X
Cost of social services otherwise consumed	X	X		X
Cost difference between transient and persistent homelessness		X		X
Cost of persistent homelessness	X		X	
Cleaning costs (loss to landlords)	X	X	X	X
Cost of bad debt (to landlords)	X	X	X	X

## 4.5 Stakeholder Value

There are three key stakeholder groups for whom STEP Home’s Intensive Support Programs create value. The stakeholder groups are: participants, government and the landlords of STEP Home participants.

For individual participants, homelessness can result in exposure to violence, problematic substance use, and a myriad of other threats. These experiences can result in desperation, isolation and hopelessness. STEP Home’s Intensive Support Programs create value for participants by decreasing their victimization, food insecurity, income challenges, barriers to accessing systems and alienation. Without the changes inspired through the programs, participants risk aging prematurely, disconnection from social services, discrimination and a reduction in self-worth, remaining at risk of violence, involvement in problematic substance use and exposure to mental and physical stress resulting in breakdown. While the changes experienced by participants do create significant social value, the intangibility of some of this value means that it may never be fully captured in financial terms.

*People may have been hardened after many years of trauma and are afraid to let someone really get to know them, because they feel like they may get hurt again. The program helps them to feel again and to open up that part of themselves. This is the core of the change that happens through the program.*

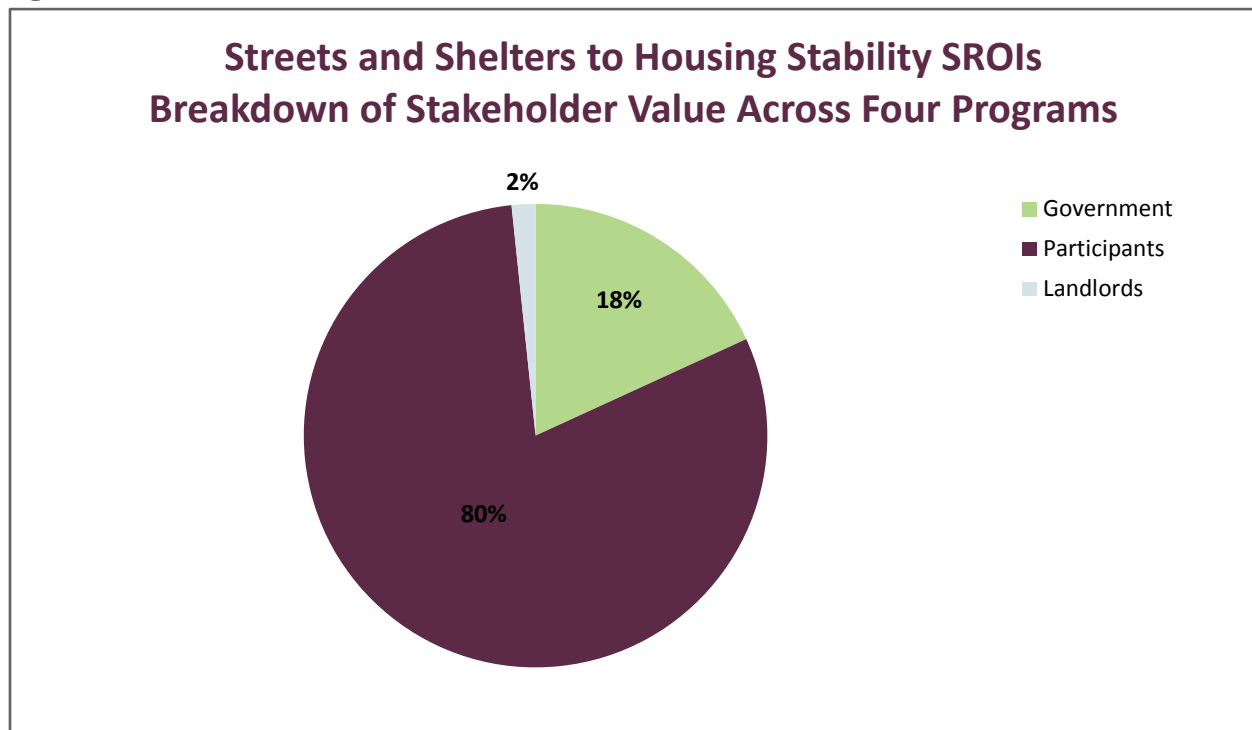
*–Direct Support Worker*

For government, there is economic value in addressing persistent homelessness. Studies show the creation of social value through reduction in the use of emergency, crisis supports, health, justice, and social services (refer to Appendix C for full resource list).

For the landlords, social value is created through their increased empathy towards individuals with different life situations. In a tangible economic way, the stability fostered through the program decreases management and maintenance costs for landlords, as they experience reduced tenant turnover and increased contribution by tenants to the maintenance of the property.

Looking at the social value created through these four program sites, Figure 2 depicts the breakdown by stakeholder value. The greatest proportion of value from the programs analyzed was attributed to the program participants (80%) confirming the need for further engagement of this group to ensure future accuracy of the SROI forecast models developed through this study. Further, program service delivery can be enhanced if the value that participants experience is taken into account and programming is designed to fit with this value.

Figure 2



## 5. Conclusion

This report presented the results of four SROI case studies piloted in two STEP Home programs in Waterloo Region. The report aimed to provide a preliminary picture of the range of values created through STEP Home. The results indicate that the greatest value is provided to program participants (80%) followed by government (18%) and landlords (2%). The results of the SROI analysis of investment in STEP Home’s Intensive Support Programs is significant, showing a range of \$8.25 to \$10.64 in social value created for every dollar invested. The average value across the four programs is **\$9.45 in social value created for every dollar invested**. By updating results of the SROI analysis on an on-going basis, greater insight into the effectiveness of the programs will be developed. This has a direct impact on the success of the services and processes targeting persistent homelessness.

*I feel in my heart that partially because of STEP Home, there is no turning back to my old life of addiction and homelessness. STEP Home has changed my life and it continues to change it every day. In the beginning of my journey, there was only a glimmer of light and now my tunnel has such a bright life, there is no turning back.*

*–Participant*

The range of values developed through the study does not necessarily mean that any one particular *Streets or Shelters* program is more valuable or effective than another. The ratios simply confirm that



social value is created by the different approaches and that they are useful in addressing a variety of real-life and demographically-specific situations. Caution should be used in comparing the SROI ratios program to program or site to site as there are differences between the numbers and types of participants served by each. The ratios do help to demonstrate the large amount of social value created through the STEP Home approach to addressing persistent homelessness.

Based on the SROI analyses presented here, it is evident that the STEP Home approach to addressing persistent homelessness in Waterloo Region is extremely valuable, particularly to the participants in the program. The process used to conduct the SROI analysis engaged program staff in the creation of the forecast models. This engagement fuelled interest in demonstrating the value of the changes created through the programs. The challenges, key findings and learnings of this study lead to the following conclusions that the Region and its community partners may wish to consider as next steps.

1. *Consider investing in program data collection capacity to move the analyses from forecast to evaluation and to continue using the models established in this study.* Where projects can be supported in collecting and managing program data and establishing evaluation practices, SROI analyses can evolve from forecast to evaluation eliminating the need for estimations. Investments in project capacity also enable projects to understand and articulate the value of their programming, and maximize the delivery to participants. The benefits of this could include the potential to further diversify project funding base as the valuation methodology helps to quantify and communicate results to other potential funders within the community.
2. *Consider increasing participant engagement to strengthen the results of SROI analyses in future studies.* As highlighted in the challenges section of this report, the SROI analyses of two STEP Home programs at four program sites could be strengthened by increased stakeholder engagement. The individual case study results, as well as this report could be shared with all stakeholders, particularly participants, to verify the results and gather input for an ongoing study of value creation. Increased stakeholder engagement helps match program delivery with the outcomes valued by participants. As stakeholders are consulted on an on-going basis, the nuance of their experience in the program can reveal areas for process improvement giving individuals a greater sense of personal investment in the projects. Participant engagement can be facilitated through the monthly meetings of the STEP Home Participant Advisory Group (PAG).
3. *Extend the use of SROI methodology to measure the social value created by other STEP Home programs.* Since the Streets and Shelters to Housing Stability programs represent only two of twelve programs under the umbrella of STEP Home, a more robust understanding of the overall social value of STEP Home could be fostered through the extension of SROI analysis to additional programs. Additional sites can build upon the experience of the initial four case studies discussed in this report, leading to quicker results and more opportunity for stakeholder engagement. This may be achieved, for example, by establishing support for a community of practice where work can be shared across projects to foster an understanding of outcomes, indicators, and financial proxies that relate to different projects working to solve persistent homelessness within Waterloo Region.

## 6. Appendices

### Appendix A: Region of Waterloo Description of Differences between Streets and Shelters to Housing Stability Programs<sup>9</sup>

Although *Streets* and *Shelters* share a similar approach and both focus on the importance of the role of the direct support worker in engaging with participants, four basic differences between the programs were noted.

*Starting point* – Where *Streets* participants have been living in an unsheltered homeless situation (residing in indoor or outdoor spaces not intended for living like parks or stairwells) sometimes for years, *Shelters* participants are still cycling through the shelter system but have not yet become entrenched in an unsheltered homeless situation. They are considered as very high-risk of persistent homelessness.

*Likely source of income support* – *Shelters* participants are more likely to access Ontario Works (OW) as income support while *Streets* participants are more likely to access Ontario Disability Support Program (ODSP) benefits. While both programs seek to help individuals move away from income support towards employment (if they are able) once their housing situation has stabilized, it is more likely that *Shelters* participants would become employed over time.

*Level of support* – *Streets* participants may require a more intensive level of support for a longer period of time than *Shelters* participants. This is attributed to the varying degrees of strength of association with homelessness. *Streets* participants are *more* entrenched (their experience of homelessness is more normalized) and *Shelters* participants are *less* entrenched but are at high-risk of experiencing persistent homelessness.

*Ability to integrate into community*<sup>10</sup> – *Shelters* participants are more likely to be interested and/or able to seek out volunteer and employment opportunities.

**Table 1: Summary of Differences – Shelters and Streets to Housing Stability Programs**

	<b>Shelters to Housing Stability</b>	<b>Streets to Housing Stability</b>
<b>Starting point</b>	Cycling through emergency shelter	On the streets for a prolonged period of time
<b>Likely source of income</b>	OW, potentially moving towards employment	ODSP, not likely to be employed
<b>Level of support</b>	Less intensive, less prolonged	More intensive, longer period
<b>Level of hope</b>	Some hope remaining	Hope largely lost
<b>Degree of contribution</b>	More likely to ability/opportunities to participate in volunteer and/or employment opportunities, volunteer	Less likely to have ability/opportunities to participate in volunteer and/or employment opportunities

<sup>9</sup> Social Planning, Policy and Program Administration (2012). STEP Home Description 2012. Waterloo, ON: Regional Municipality of Waterloo.

<sup>10</sup> One of eight characteristics of an inclusive community identified in the Homelessness to Housing Stability Strategy (2012)

## Appendix B: Discount Rate Factors

<b>Forecasting/Actuals/Quantities</b>	Are they still forecasting? Are the forecasts reasonable?
<b>Stakeholder perspective represented</b>	Are non government proxies included? Are surveys etc. being used to capture stakeholder voice?
<b>Evaluation tools and system</b>	Measuring outcomes?
<b>Best practice and research</b>	Are following another best practice model, based in research,
<b>Environmental factors</b>	Understand community need in relation to program reach
<b>Internal Capacity</b>	Staff turnover, understanding of SROI and evaluation process
<b>Organization History</b>	Is this a new collaboration or partnership? Is this an untested pilot project?
<b>Scope</b>	Is the project working towards systemic change, or with a targeted cohort?

Based on the above criteria, discount rates are set at the following levels:

Default of 8% based on Government of Canada social discount rate (See: Boardman, A., Moore, M. & Vining, A. (2010). *The Social Discount Rate for Canada Based on Future Growth in Consumption. Canadian Public Policy, Vol. 36 No. 3.*)

- 8% for those projects considered “low risk” where most of the above criteria indicates stability and likelihood that they are achieving the outcomes claimed in their analysis.
- 22% for those projects considered to have “some risk” of not achieving their outcomes. There will be some concern in the above outlined criteria.
- 30% for those projects considered to have “moderate risk” of not achieving their outcomes. At least half of the criteria above will indicate concern.
- 50% for those projects considered “high risk” where most of the above criteria indicates disorganization, instability, or inability to meet outcomes claimed in their analysis.

## Appendix C: Resource List

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## **Appendix D: Executive Summaries of the Four Individual STEP Home Programs**

- i. Argus Residence for Young People
- ii. Cambridge Shelter Corporation
- iii. Charles Street Men's Hostel
- iv. YWCA - Mary's Place

#### Homelessness Facts:

- 73% of youth in a homeless situation experience repeated criminal victimization.
- The suicide rate for people experiencing homelessness is 40 times higher than the national average.
- People experiencing homelessness are hospitalized five times more often than the general public.
- The risk of problematic substance use is higher among youth experiencing homelessness compared to other youth.

#### STEP Home:

- Includes 12 programs at 10 organizations across 19 sites
- Goal is to provide options and supports to end persistent homelessness in Waterloo Region

#### Shelters to Housing Stability Program:

- Operates out of four emergency shelters in the Waterloo Region

#### Argus Residence for Young People Site:

- The only intensive support program in STEP Home specifically designed to serve youth experiencing persistent homelessness
- For every dollar invested in the Shelters to Housing Stability program at the Argus Residence for Young People, **there is \$9.37 in social value created by the program.**

*\*A full list of references is available upon request.*

#### For information related to STEP Home, contact:

(519) 883-2117  
stephome@regionofwaterloo.ca

#### For information related to Shelters to Housing Stability at Argus, contact:

(519) 623-7991  
argusyw@execulink.com

This SROI is one of a series of four analyses that illustrate the social value created through STEP Home. See *Region of Waterloo STEP Home SROI Roll-Up Report (2013)* for a full account of the range of social value created through STEP Home programs at Argus Residence for Young People, Cambridge Shelter, Charles Street Men's hostel, and YWCA-Mary's Place.

#### SHELTERS TO HOUSING STABILITY, ARGUS RESIDENCE FOR YOUNG PEOPLE

Shelters to Housing Stability operating out of the Argus Residence for Young People is one STEP Home program that seeks to address homelessness amongst youth ages 16 to 24 at high-risk of persistent homelessness.

When young people are in a homeless situation they are extremely vulnerable and can easily become victims of violence, crime and/or exploitation. If youth are not engaged early, they will 'normalize' their experience of homelessness and be at high risk of long-term, persistent homelessness. The Shelters to Housing Stability program helps youth residing at the Argus Residence for Young People emergency shelter avoid this path and to move towards healthy development of life skills and retention of housing stability.

Direct support workers engage with youth in order to develop meaningful and trusting relationships that enable them to consider various transitions.



These might include returning to their families, living independently, living with friends, moving to the Five Beds to Home program, or returning to the shelter in the future.

#### THEORY OF CHANGE

If youth who are in a homeless situation due to family abuse, social isolation, early pregnancy, mental or physical health issues, and other compounding factors are given intensive, person-centred and unconditional support, their sense of belonging in the community will increase, they will move toward stable and appropriate housing and overcome existing barriers in order to successfully embrace a future outside of the emergency shelter system.

While some of the youth who are initially housed with the support of the Shelters to Housing Stability program may return to the emergency shelter because their housing situations have broken down, their return to Argus is considered a valuable outcome. Youth that return to Argus are otherwise avoiding the

alternative of street involvement which includes significant risks of exploitation and victimization. If a young person is able to stay safe, they will continue on their journey towards stable housing.

*"The staff have done more for me in two years than my family has my whole life."*

- Participant





# Social Return on Investment (SROI)

## Argus Residence for Young People Executive Summary

### Shelters to Housing Stability Program

January – December 2011



#### PARTICIPANT PROFILE

Individuals participating in the Shelters to Housing Stability program at Argus Residence for Young People are male or female youth between the ages of 16 and 24. They have typically accessed emergency shelter services repeatedly (4 times or more) for a prolonged period of time (6 months or more).

These youth face multiple challenges that contribute to their lack of housing. These may include mental or physical health issues, problematic substance use, family instability, abuse, poverty or social isolation, cognitive and/or physical disabilities, aggression and behavioural challenges, early pregnancy, and/or criminal justice system involvement.

These issues create barriers to housing stability and result in the need for intensive support in participants' journey to be able to access and retain adequate housing. It is recognized that youth participating in the program are at different developmental stages and that transitioning to housing outside of the supportive emergency shelter environment can only happen once they have reached a developmental stage where the options presented are desirable and possible.

#### SOCIAL VALUE OF ADDRESSING HOMELESSNESS

The Shelters to Housing Stability program creates social value through the diversion of young people out of homelessness, including the victimization and other trauma they may experience as a result of being in a homeless situation. Social value is also created through the development of a safe and caring community that supports and empowers youth in their development so that they are able to retain stable housing when they are ready. The value experienced by participants includes achieving a level of personal stability that then enables them to attend school, look for employment, develop positive meaningful relationships, and integrate into the community.

Social value is also created for other stakeholders including government services, as well as the landlords that the program engages. Many studies show that while individuals are in a homeless situation, they use a disproportionate amount of emergency and crisis support services (a full list of references is available upon request). If they are avoiding persistent homelessness and as their housing situation is stabilized, participants are better able to interact within social support systems leading to substantial economic value for government services. This includes decreased use of health, justice, and social services.

In a tangible economic way, the stability that is fostered through the program helps participants to retain their housing and develop positive relationships with their landlords. Value is created by decreased tenant turnover and increased care of landlord's property.

\*Full analysis details, including references, financial proxies, and all calculations available upon request

#### SROI ANALYSIS AND RESULTS

The Social Return on Investment (SROI) analysis of the Shelters to Housing Stability program at Argus Residence for Young People involved mapping the outcomes of the program, giving them a value, discounting to avoid over-claiming, and calculating the ratio of investment to social value creation. This analysis looked at the outcomes for the 12 individuals who participated in the program during 2011.

The outcomes mapping and then valuing considered the entire life-cycle of the program from the value of the relationship building and transition support in the emergency shelter to the on-going support in the Five Beds to Home program. Throughout, value was considered from three perspectives: participant, landlord and changes to government services.

In total, 19 unique outcomes were identified and valued using 24 financial proxies. The total present value of investing in the program was calculated to be \$468,454. With a total investment in the program of \$50,000, the final SROI ratio was calculated to be **9.37 : 1**. This indicates that for every dollar invested in the Shelters to Housing Stability program at Argus Residence for Young People, **there is \$9.37 in social value created by the program.**

Of note is that this ratio represents a minimum value as the most conservative estimations were taken where estimations were made throughout the analysis. Further, the essence of the hope and other intangible outcomes created by the program could not be completely captured in financial terms, meaning the overall social value is significantly higher than the value represented in the SROI.

#### Homelessness Facts:

- Mean age of death for people experiencing persistent homelessness is 34-47 years.
- The suicide rate for people experiencing homelessness is 40 times higher than the national average.
- As many as 78% of people experiencing unsheltered homelessness have been victims of crime.
- People experiencing homelessness are hospitalized five times more often than the general public.

#### STEP Home:

- Includes 12 programs at 10 organizations across 19 sites.
- Goal is to provide options and supports to end persistent homelessness in Waterloo Region.

#### Streets to Housing Stability Program:

- The Streets to Housing Stability program operates out of three sites in Waterloo Region.

#### Cambridge Shelter Site:

- The direct support worker at Cambridge Shelter supported 13 individuals in 2011 through the Streets to Housing Stability program.
- For every dollar invested in Streets to Housing Stability at Cambridge Shelter, **there is a return of \$8.25 in social value created by the program.**

*\*A full list of references is available upon request..*

#### For information related to STEP Home, contact:

(519) 883-2117  
stephome@regionofwaterloo.ca

#### For information related to Streets to Housing Stability at Cambridge Shelter, contact:

(519) 624-9305  
samantha@cambridgesheltercorp.ca

This SROI is one of a series of four analyses that illustrate the social value created through STEP Home. See *Region of Waterloo STEP Home SROI Roll-Up Report (2013)* for a full account of the range of social value created through STEP Home programs at Argus Residence for Young People, Cambridge Shelter, Charles Street Men's hostel, and YWCA-Mary's Place.

#### STREETS TO HOUSING STABILITY, CAMBRIDGE SHELTER

Streets to Housing Stability is one STEP Home program that seeks to address homelessness amongst individuals who have been living in unsheltered situations (residing in indoor or outdoor spaces not intended for living like parks or stairwells) for years. Participants in the program have often lived on the streets for so long that the situation has

become normalized and they become entrenched in a homeless situation - referred to as persistent homelessness. The program centres on the philosophy that establishing relationships will awaken hope within a person who may have felt hopeless for many years, which can open them to the possibility of one day residing in housing.



For many people, hopelessness

#### THEORY OF CHANGE

If people approaching or experiencing persistent homelessness are unconditionally supported on a path toward housing stability through relationship-building, securing income and housing of their choice, they will take action to improve their own health and quality of life, which will positively impact the broader community.

results from the inability to successfully navigate through complex systems, which contributes to their spiral into longer term homelessness. After identifying an individual's system barriers, the Streets to Housing Stability program's direct support worker and participant work together to

*"I would be dead if it wasn't for this program"*  
- Participant



create a customized and responsive approach to address the participant's circumstances. As their relationship develops and barriers are removed, participants typically move toward desiring and experiencing some level of housing stability.

*"My worker and I care for each other and sometimes we even go for coffee. We are kind of like friends with boundaries."*  
-Participant



# Social Return on Investment (SROI)

## Cambridge Shelter Corporation Executive Summary

### Streets to Housing Stability Program

April 2011 - March 2012



#### PARTICIPANT PROFILE

Individuals participating in the Streets to Housing Stability program at Cambridge Shelter are male and female adults experiencing persistent homelessness between the ages of 25-75. They are living in extreme poverty and face a host of circumstances which may include physical, mental health and cognitive issues, problematic substance use, trauma, discrimination and community exclusion. They have all experienced challenges in navigating community systems (e.g., health care, mental health, income

support and transportation), which can increase barriers and prevent individuals from achieving housing stability on their own.

Individuals who are in a homeless situation are more frequently victimized and many Streets to Housing Stability participants have lived in fear of violence on a daily basis. Without the changes made possible through the program, participants may age prematurely, be disconnected from social services, experience discrimination and possibly a reduced sense of self-worth, remain at risk of violence, experience harm related to problematic substance use, and experience mental and physical health issues.

#### SOCIAL VALUE OF ADDRESSING HOMELESSNESS

By addressing the complex situations of individuals experiencing persistent homelessness in the Streets to Housing Stability program at Cambridge Shelter, value is created by decreasing participants' victimization, food insecurity, income challenges, barriers to accessing systems and alienation (see full report for list of financial proxies used). Changing these circumstances creates significant social value, some of which can never be fully captured in financial terms.

Social value is also created by this program for other stakeholders including government services and local landlords that the program engages. Many studies show that while individuals are in a homeless situation, they use a disproportionate amount of emergency and crisis support services (a full list of references is available upon request). The economic value to government services of addressing homelessness is quite significant and includes decreased use of health, justice, and social services.

In a tangible economic way, the stability that is fostered through the program helps participants to retain their housing and develop positive relationships with their landlords. Value is created by decreased tenant turnover and increased care of landlord's property.

\*Full analysis details, including references, financial proxies, and all calculations available upon request

“STEP Home has changed my life and it continues to change it everyday.”  
-Participant

#### SROI ANALYSIS AND RESULTS

The Social Return on Investment (SROI) analysis of the Streets to Housing Stability program operating out of Cambridge Shelter involved mapping stakeholder outcomes, giving them a value, discounting to avoid over-claiming, and calculating the ratio of investment to social value creation. This analysis looked at the outcomes for the 13 individuals who participated in the program from April 2010 – March 2011.

The SROI analysis placed value on relationship building at the core of the program. Next, the changes experienced by individuals as they received intensive support through the program were analyzed and valued from different perspectives. Finally, the impact of the longer-term lower-level support provided by the direct support worker was included. Throughout, value was considered from three perspectives: participant, landlord and changes to government services.

In total, 24 unique outcomes were identified and valued using 19 financial proxies. The total present value of investing in the program was calculated to be \$422,953. With a total investment in the program of \$51,258 the final SROI ratio was calculated to be **8.25: 1**. This indicates that for every dollar invested in the Streets to Housing Stability program at Cambridge Shelter, **there is \$8.25 in social value created by the program.**

Of note is that this ratio represents a minimum value as the most conservative estimations were made throughout the analysis. Further, the essence of the hope and other intangible outcomes created by the program could not be completely captured in financial terms, meaning the overall social value is significantly higher than the value represented in the SROI ratio.

#### Homelessness Facts:

- Individuals experiencing persistent homelessness have a 127 times higher chance of dying of an early death than the average Canadian.
- The suicide rate for people experiencing homelessness is 40 times higher than the average.

#### STEP Home:

- Includes 12 programs at 10 organizations across 19 sites.
- Goal is to provide options and supports to end persistent homelessness in Waterloo Region.

#### Shelters to Housing Stability Program:

- Operates out of four emergency shelters in Waterloo Region.

#### Charles St. Men's Hostel Site:

- Each day, there are at least 3 people in the shelter who could be a candidate for the Shelters to Housing Stability program. The program is at capacity.
- 25% of people who have transitioned from the program have engaged in meaningful employment or volunteer opportunities.
- People typically transition into more permanent housing after 18 months.
- For every dollar invested in Shelters to Housing Stability at Charles Street Men's Hostel, **there is a return of \$10.64 in social value created by the program.**

*\*A full list of references is available upon request.*

#### For information related to STEP Home, contact:

(519) 883-2117  
stephome@regionofwaterloo.ca

#### For information related to Shelters to Housing Stability at Charles St. Men's Hostel, contact:

(519) 742-8327 ext. 339  
shelbertohousing@houseoffriendship.org

This SROI is one of a series of four analyses that illustrate the social value created through STEP Home. See *Region of Waterloo STEP Home SROI Roll-Up Report (2013)* for a full account of the range of social value created through STEP Home programs at Argus Residence for Young People, Cambridge Shelter, Charles Street Men's hostel, and YWCA-Mary's Place.

#### SHELTERS TO HOUSING STABILITY, CHARLES ST. MEN'S SHELTER

Shelters to Housing Stability is one STEP Home program that provides intensive, flexible support to individuals who have been cycling through the emergency shelter system and are at high risk of persistent homelessness. In this program, the direct support worker attempts to establish trusting and positive relationships with individuals in order to support them to obtain and retain housing stability in the shorter term, on the path towards longer term housing stability. This approach is designed to prevent individuals from becoming more entrenched in a homeless situation.

For many individuals cycling in and out of emergency shelters, their first housing option is unlikely to be permanent because the available housing is less-than-ideal (e.g., unsafe or poorly maintained). Further, it could be that the appropriate housing model may not be available or that the individual may not yet be ready to live independently. However, taking the initial step towards being housed prepares participants for more desirable housing when it becomes available.



The Shelters to Housing Stability program's direct support worker enhances each person's ability to maintain a more stable living arrangement, and to develop a clear vision for their own future that includes housing. This fosters a participant's ability to live through an initial housing scenario that may not be optimal.

As a result of abuse and violence, individuals involved

in the program have developed protective barriers that hinder their ability to trust others. The value created by the Shelters to Housing Stability program is possible due to the trusting relationships fostered between the direct support worker and participants that ultimately lead to an increased openness to the possibility of obtaining and retaining housing.

#### THEORY OF CHANGE

If people who have been cycling between emergency shelters and precarious shared living arrangements are supported to explore their future hopes and dreams so that they come to meaningfully engage in community life, they will be more likely to increase personal capacity and to obtain and retain housing stability.

*"It feels good to know that someone sticks up for you and someone cares about you."*

- Participant



# Social Return on Investment (SROI)

## Charles Street Men’s Hostel Executive Summary Shelters to Housing Stability Program



January – December 2011

### PARTICIPANT PROFILE

Individuals participating in the Shelters to Housing Stability program at Charles St. Men’s Hostel are men ages 23-60. Eighty percent of participants experience problematic substance use, and almost 50% have spent time in prison or correctional facilities. At least 75% have diagnosed mental health issues.

Typically, when individuals become participants they have been cycling between emergency shelters and precarious shared living arrangements, which places them at serious risk of becoming entrenched in a homeless situation. After 2 to 3 years of cycling in and out of emergency shelters, a person will become emotionally and physically exhausted as a result of the turmoil of packing, moving belongings or leaving possessions behind when it is not possible to carry them – this is all in addition to a gradual loss of hope and increasing disappointment of never feeling settled.

While their housing situations may have been unstable for some time, participants do remember a time when they had a more secure life-style. Their relationship with their direct support worker enables them to draw upon memories as they lay the foundation for a plan to retain longer term housing stability. If barriers to a person’s journey exist, the direct support worker and the individual will face and try to remove those barriers together. On average, participants are actively involved in the program for 18 months.

### SOCIAL VALUE OF ADDRESSING HOMELESSNESS

The Shelters to Housing Stability program engages with individuals at a point when they are not yet entrenched in a homeless situation. Social value is created for participants by creating trusting relationships and decreasing their risk of experiencing persistent homelessness. Specifically, value is created through decreasing their risk of victimization, food insecurity, income challenges, system access barriers and alienation

Social value is also created by this program for other stakeholders including government services, as well as the landlords that the program engages. Many studies show that while individuals are in a homeless situation, they use a disproportionate amount of emergency and crisis support services. If they are avoiding persistent homelessness and as their housing situation is stabilized, participants are better able to interact within social support systems leading to substantial economic value for government services. This includes decreased use of health, justice, and social services.

In a tangible economic way, the stability that is fostered through the program helps individuals to retain their housing and develop positive relationships with their landlords. Value is created by decreased tenant turnover and increased care of the landlord’s property.

\*Full analysis details, including references, financial proxies, and all calculations available upon request

*“There has never been a participant in this program who was not interested in giving back to the community in some way; usually through volunteering or paid employment.”*

- Direct Support Worker

### SROI ANALYSIS AND RESULTS

The Social Return on Investment (SROI) analysis of the Shelters to Housing Stability program at Charles St. Men’s Hostel involved mapping the outcomes of the program, giving them a value, discounting to avoid over-claiming, and calculating the ratio of investment to social value creation. This analysis looked at the outcomes for the 21 individuals who participated in the program during 2011. The outcomes mapping and valuing considered the entire life-cycle of the program.

This began with understanding the value of relationship building and engagement in helping individuals to increase their trust in others and to address their previous trauma. Next, the changes experienced by individuals as they received intensive support through the program were analysed. Finally, the impact of the longer-term lower-level support provided by the direct support worker was included in the SROI. Throughout, value was considered from three perspectives: participant, landlord and changes to government services.

In total, 21 unique outcomes were identified and valued using 23 financial proxies (see report for details). The total present value of investing in the program was calculated to be \$563,817. With a total investment in the program of \$52,973, the final SROI ratio was calculated to be **10.64 : 1**. This indicates that for every dollar invested in Shelters to Housing Stability at Charles St. Men’s Hostel, **there is \$10.64 in social value created by the program.**

Of note is that this ratio represents a *minimum* value as the most conservative estimations were made throughout the analysis. Further, the essence of the hope, trust, and other intangible outcomes created by the program could not be completely captured in financial terms, meaning the overall social value is significantly higher than the value represented in the SROI ratio.

### Homelessness Facts:

- 25-30% of people living on the streets or in shelters in Canada are women.
- Women experiencing homelessness aged 18-44 are ten times more likely to die than women of the same ages who have homes.
- Physical and sexual violence is a leading cause of homelessness, especially for women and youth.
- 55% of women experiencing homelessness have been diagnosed with a mental health issue.

### STEP Home:

- Includes 12 programs at 10 organizations across 19 sites.
- Goal is to provide options and supports to end persistent homelessness in Waterloo Region.

### Streets to Housing Stability Program:

- The Streets to Housing Stability program operates out of three sites in Waterloo Region.

### YWCA-Mary's Place Site:

- The direct support worker at YWCA-Mary's Place supported 14 individuals in 2011 through the Streets to Housing Stability program.
- For every dollar invested in the Streets to Housing Stability program at YWCA-Mary's Place, **there is a return of \$9.75 in social value created by the program.**

*\*A full list of references is available upon request.*

### For information related to STEP

#### Home, contact:

(519) 883-2117

stephome@regionofwaterloo.ca

### For information related to Streets to Housing Stability at YWCA-Mary's Place, contact:

(519) 744-6507 ext. 211

MGRMP@ywcakw.on.ca

This SROI is one of a series of four analyses that illustrate the social value created through STEP Home. See *Region of Waterloo STEP Home SROI Roll-Up Report (2013)* for a full account of the range of social value created through STEP Home programs at Argus Residence for Young People, Cambridge Shelter, Charles Street Men's hostel, and YWCA-Mary's Place.

## STREETS TO HOUSING STABILITY, YWCA—MARY'S PLACE

Streets to Housing Stability is one STEP Home program that seeks to address homelessness amongst individuals who have been living in unsheltered situations (residing in indoor or outdoor spaces not intended for living like, parks or stairwells) for years. Participants in the program often have lived on the streets for so long that the situation has become normalized and they become entrenched in a homeless situation – this is referred to as persistent homelessness. The program at YWCA - Mary's Place addresses the particular situation of women and transgendered individuals who are experiencing persistent homelessness.

While homelessness is extremely challenging for any individual, for women and transgendered individuals the danger and discrimination that they face on the street is even more extreme.

The Streets to Housing Stability program addresses participants' vulnerability to sexual exploitation, intimate partner violence, and other threats that they experience daily. This is done by establishing relationships that build trust and awaken hope, despite the fact that participants may have felt hopeless and trapped for years.



The direct support worker helps to create a customized and responsive approach for each participant to work towards addressing systems barriers, avoiding sexual violence and exploitation, confronting problematic substance use, mitigating mental health issues, and reuniting estranged families. Participants are able to move forward with their

lives and shed their feelings of hopelessness as they address past trauma in a healthy way and re-establish relationships with their families and within their communities.



### THEORY OF CHANGE

If women and transgendered persons who have been living on the street or in shelters and who have experienced abuse, trauma, poverty, and/or health issues (mental/physical) are supported in an empowering way, then they will increase their trust in others, access services that will increase their sense of personal safety, and gain the ability to move toward stable housing.



# Social Return on Investment (SROI)

## YWCA - Mary's Place Executive Summary Streets to Housing Stability Program

January – December 2011



### PARTICIPANT PROFILE

Individuals participating in the Streets to Housing Stability at YWCA - Mary's Place are female and transgendered adults experiencing persistent, unsheltered homelessness. They have usually been living on the streets for many years and have been exposed to violence, discrimination, social isolation, and numerous traumas which have been exacerbated due to the vulnerability created by their gender identity. One of the greatest traumas experienced by the participants is the loss of their child(ren) to the foster care system or due to estrangement. They often face substance use and mental/physical health issues, and have experienced extreme poverty as well as abuse or exploitation in their lives.

Due to the complexity of the challenges faced, as well as the sensitive nature of the trauma and victimization they have experienced, participants require intensive, yet flexible support. Without the changes made possible through involvement in the Streets to Housing Stability Program operating out of YWCA-Mary's Place, participants would be at risk of sexual exploitation, violence, mental and physical breakdown, and possible continued substance use. Their self-esteem would remain low, and their sense of hopelessness and social exclusion would continue; in some cases to the point of such an extreme outcome as suicide. Without connection to their families (including estranged children) their ability to address trauma and reconcile their feelings of worthlessness would be far more difficult.

*"Getting housing through STEP Home gave me a sense of belonging and the feeling that I was worthy of having a normal life and a home"*  
- Participant

### SOCIAL VALUE OF ADDRESSING HOMELESSNESS

By addressing homelessness for women and transgendered individuals experiencing persistent homelessness, the Streets to Housing Stability program enhances the quality of life of participants, and leads to decreased experiences of vulnerability, fear, shame, and guilt. As participants move towards housing options, their exposure to risk of violence and sexual exploitation are decreased, and they are able to avoid contact with the justice system, address problematic substance use, and eventually seek employment, education, and volunteer opportunities.

Social value is also created by this program for other stakeholders including government services, and local landlords that the program engages. Many studies show that while individuals are in a homeless situation, they use a disproportionate amount of emergency and crisis support services (full reference list available upon request). The economic value to government services of addressing homelessness is quite significant and includes decreased use of health, justice, and social services. Further, as participants in the program establish stability, they are increasingly able to have their children return to their care from the foster care system or to re-establish connections with their children .

In a tangible economic way, the stability that is fostered through the program helps participants to retain their housing and develop positive relationships with their landlords. Value is created by decreased tenant turnover and increased care of landlords' property.

### SROI ANALYSIS AND RESULTS

The Social Return on Investment (SROI) analysis of the Streets to Housing Stability Program operating out of YWCA-Mary's Place involved mapping stakeholder outcomes, giving them a value, discounting to avoid over-claiming, and calculating the ratio of investment to social value creation. This analysis looked at the outcomes for the 14 individuals who participated in the program during 2011.

The SROI analysis placed value on relationship building at the core of the program. Next, the changes experienced by individuals as they received intensive support through the program were analyzed and valued from different perspectives. Finally, the impact of the longer-term lower-level support provided by the direct support worker was included. Throughout, value was considered from three perspectives: participant, landlord and changes to government services.

In total, 19 unique outcomes were identified and valued using 23 financial proxies (see full report for details). The total present value of investing in the program was calculated to be \$621,491. With a total investment in the program of \$63,724 the final SROI ratio was calculated to be **9.75 : 1**. This indicates that for every dollar invested in the Streets to Housing Stability program at the YWCA-Mary's Place, **there is \$9.75 in social value created by the program.**

Of note is that this ratio represents a minimum value as the most conservative estimations were made throughout the analysis. Further, the essence of the hope and other intangible outcomes created by the program could not be completely captured in financial terms, meaning the overall social value is significantly higher than the value represented in the SROI ratio.

\*Full analysis details, including references, financial proxies, and all calculations available upon request