

# **Needs Assessment and Funding Priorities Review**

Ensuring Resources Clearly Benefit  
the Residents of York Region

## **FINAL REPORT**

Prepared by:



# Needs Assessment and Funding Priorities Review Final Report

This is the FINAL REPORT of the Needs Assessment and Funding Priorities Review. The objective of this culminating report is to highlight the process, background and findings. Specifically, the report covers the following:

- I. Project Overview (Summarizes steps, deliverables and timing)
- II. Community Context (York Region Profile)
- III. United Way of York Region Snapshot (Profile and Current Challenges)
- IV. Conclusions (Funding Priorities and UWYR Role)

## I. Project Overview

Every five years, United Way of York Region (UWYR) reviews its funding priorities, in light of the changing human care environment in York Region. This ensures that UWYR resources are strategically allocated to those who need help the most.

The review takes stock of past successes and challenges, develops a clearer understanding of the community, identifies the most pressing needs, and sets a framework for funding priorities. The project draws on demographic research and invites input from all sectors of the community to create the foundation for informed decisions.

### Key Steps

Together, UWYR and the consultants:

- reviewed existing information and interviewed representatives of United Way agencies and donors;
- prepared a background report "*Understanding Our Environment*";
- held a workshop with United Way Board, staff, and volunteers on community needs, funding priorities, ways to measure impact, and the merits of various service delivery models;
- issued "*Emerging Directions Report*" that synthesized the research and input to date and identified emerging directions for UWYR's role in addressing these community needs;
- held broad community consultation to explore community needs and the role of UWYR;
- issued the Community Consultation Report "*Collective wisdom, emerging directions*";
- released the Final Needs Assessment and Funding Priorities Report.

### Timing

- Phase I, background report *Understanding Our Environment* completed in February 2004;
- Phase II, *Emerging Directions Report* completed in mid-April 2004, *Community Consultation Report* completed in June 2004;
- Phase III, *Final Needs Assessment and Funding Priorities Report* to be completed by June 30, 2004.

## **Validity of Background Information and Review Findings**

A variety of information sources contributed to the Review's statistical and contextual foundation, including:

- materials from the Regional Municipality of York, the Simcoe-York District Health Council, the Human Services Planning Coalition of York Region, Statistics Canada, United Way of York Region, and United Way of Canada;
- feedback from consultations with member agencies, UWYR staff, volunteers and donors;
- Region-wide community consultation sessions (face-to-face and web-based).

The analysis leading to the conclusions presented in the Report must nevertheless be recognized as **subjective**. The analysis combined:

- direction from the Advisory Committee on Needs Assessment and Priorities Setting (ACNAPS);
- the frequency and substantive content of various sources of information;
- the consultant team's knowledge and experience in distilling community input; and,
- the consultant team's knowledge and experience in developing community initiatives.

## **II. Community Context**

### **Rapid Growth & Increasing Diversity**

York Region is changing and growing very quickly. 300,000 new residents moved into York Region in the last decade and 500,000 more will arrive in the next two decades.<sup>1</sup> Foreign-born individuals represent 39.1% of the Region's population – a proportion that has increased steadily over the last several decades.

The average age of York Region residents is slightly lower than that of residents of the Greater Toronto Area (GTA). People between the ages of 35 and 54 make up 34% of the population.<sup>2</sup> However, York Region shares with the GTA the general trend towards an aging population.

The fastest-growing household types were lone-parent families (44%) and single-person households (33%). These statistics are higher than the growth rate for couple families and multi-person households respectively, suggesting a shift in family composition in the Region.

### **Areas of Great Privilege and Areas of Great Need**

York Region residents have the highest median income and the lowest rate of low-income households in Ontario. That is the good news, but our research also produced more sobering findings.

- 14% of households spend more than 30% of their income on housing.
- Although there are 15,240 children with special needs in the Region, there is no children's treatment centre.

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<sup>1</sup> Towards a New Funding Model for Social Services Funding in York Region, Human Services Planning Coalition, 2004.

<sup>2</sup> Ibid.

- Low-income residents wait 8 years for a social housing unit and 15 years for a unit designed for people with special needs.
- Access to services and jobs is hampered by the lack of an integrated transit and transportation system.
- Health care in the Region is chronically under funded.
- Not-for-profit, voluntary, and faith-based agencies are struggling to fill service gaps while facing challenges such as lack of capacity, difficulties recruiting/retaining staff/volunteers, and funding cutbacks.

### III. United Way of York Region Snapshot

#### Mission

To provide leadership, skills and resources as we unite people to build a more caring, compassionate community.

#### Vision Statement

United Way of York Region builds caring, supportive communities in partnership with all sectors of our Region. As a trusted and respected organization, United Way undertakes community needs assessment and problem solving, fundraising, funding effective social service delivery models and volunteer leadership development. The expertise and commitment of staff and volunteers optimize the use and impact of community resources, ensuring accountability and exemplary stewardship.

#### Current Status

In 2003 United Way of York Region **raised more than \$6 million** – a milestone for the organization. However, the donation rate in York Region remains in the bottom third for all United Way campaigns in Ontario, at \$7.78 per person.

The **number of agencies funded has remained fairly stable** in the last five years, going from 38 to 40, with funding focused on:

- building strong communities, one neighbourhood at a time;
- reducing stressors on families and subsequent impacts on children and youth;
- preventing and addressing domestic and family violence;
- supporting ethno-specific initiatives in York Region.<sup>3</sup>

A fundamental question remains: **What impact have these dollars made in the community?** At present, UWYR has evaluation tools and processes in place to monitor the efficiency and effectiveness of individual programs through member agencies and determine their impact in the community. What are missing are mechanisms to measure the **overall** impact in the community of funded programs relative to the stated funding priorities.

#### What does it all mean?

UWYR's existing priorities reflect the documented needs of the community and are relatively similar to those identified in many urban/suburban communities across Canada. UWYR is not alone in being asked to go beyond simply raising and distributing funds and engaging in community building. In 2002, United Way of Canada

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<sup>3</sup> Source: United Way of York Region 2004/2005 funding application.

recommended that its members focus on fostering networks, identifying strategies, and building the necessary resources that will result in change in physical and social environments.

UWYR faces **two primary challenges** in delivering this revised focus:

- truly understanding changes in the community so that funded programs and services remain relevant to the people of York Region and the community receives the maximum benefits from the funds raised; and,
- increasing the donation level in this rapidly growing community where human service needs are not as obvious as seen in urban environments.

## IV. Conclusions

Many people involved in the review consultations process touch on common sentiments. Whether they are writing on behalf of the human services sector or various levels of government; submitting comments in person or electronically; whether they represent a UWYR funded agency or non-member agency; whether they were very involved in day-to-day UWYR operations or had little past experience with the organization, common themes emerged.

- i. Many areas of York Region are prosperous, yet the list of pressing community needs is long. There is increasing awareness of the **complex web of community needs**. A person who is in need in one area of life is also likely in need in another. This means that the mechanisms used to address specific community needs must also **address the interconnectedness of issues**.
- ii. There is also recognition that some community needs are **too generic** to be addressed in a meaningful way by UWYR or are **better addressed by others**. UWYR can assess during strategic discussions what role, if any, to play as a contributor in these areas.
- iii. Given that UWYR has finite resources, it is necessary to **refine the list of issues it plans to address**. The community needs that echo clearly across all input streams focus on services and programs that help vulnerable people. These **direct needs have evolved somewhat** since the 1998 Needs Assessment (see Appendix A). In addition, the need to **build strong communities** in order to address interconnected community needs has evolved to become an **overarching principle**.
- iv. **Evaluation of the cumulative impact of UWYR resources in the community can be improved**. It is important to confirm the reason for measuring and determine how best to quantify “return on funding”. Refer to Appendix D for examples of outcomes measurement indicators and targets.

## 2004 Funding Priorities

### **Assist vulnerable people by building strong, vibrant, healthy communities by:**

- supporting those who have **mental health** challenges;
- addressing issues of **affordable housing and homelessness**;
- providing services geared towards **newcomers/immigrants**;
- promoting **literacy**; and,
- preventing **domestic violence and abuse**.

Working descriptions of the priorities can be found in Appendix B.

The priorities are not ranked, but rather “clustered” according to the frequency and content of the input received and reviewed. Building strong communities emerged as a clear principle for all funding activities. Mental health, affordable housing and homelessness, and newcomer services had similar rankings. Literacy and domestic violence were also at the top of the list. [Note: there is no differentiation between crisis intervention and prevention services and programs.]

A preliminary analysis of current funding versus funding priorities is presented in Appendix C. This analysis indicates that newcomer and literacy programs are currently at the lower end of the funding list.

### ***UWYR Role***

The Review’s Consultation Process revealed a strong desire for UWYR to continue its traditional work in **raising and distributing funds** to help those who need help the most. There is an important link between UWYR’s fundraising capacity and its ability to meet community needs. A “call to action” is needed to capture the public’s attention and realize the fundraising goals that allow UWYR to fund community priorities.

On its own, money is not the answer. **UWYR cannot be all things to all people.** UWYR roles must be defined as part of a **future strategic review** by the Board to effectively integrate the \$10 million fundraising goal defined in 2003, and the evolving community development roles articulated by various stakeholders. The following is a starting point for future discussions:

The emerging consensus is that UWYR should broaden and **deepen its role in the community** beyond fundraising to:

- increase its own profile and generate excitement about that role in the community;
- raise awareness on the perceived “hidden” social issues throughout the Region;
- be a visible advocate for issues such as infrastructure challenges and human service sector funding efforts;
- be a leader and rally partners to address existing and emerging service needs.

It is the broadened role that ties directly to the community building principle and should, in time, help to increase the donation level allowing UWYR to fund the growing list of human care needs in York Region communities.

## Appendix A 2004/1998 Funding Priority Comparison

The 2004 priorities have evolved somewhat from those identified in 1998, as follows:

2004	1998 (with additional refinement as presented in the 2003/2004 Funding Package)
<ul style="list-style-type: none"> <li>• Build strong, vibrant, healthy communities</li> </ul>	<ul style="list-style-type: none"> <li>• Community development focus on community capacity/capability building</li> <li>• <i>Build strong communities, one neighbourhood at a time</i></li> </ul>
<ul style="list-style-type: none"> <li>• Support people with mental health challenges</li> </ul>	<ul style="list-style-type: none"> <li>• Prevention regarding alleviating family stress and subsequent impact on children and youth</li> <li>• <i>Reducing stressors on families and subsequent impact on children and youth</i></li> </ul>
<ul style="list-style-type: none"> <li>• Address issues of affordable housing and homelessness</li> </ul>	<i>Not articulated</i>
<ul style="list-style-type: none"> <li>• Provide services geared towards newcomers/immigrants</li> </ul>	<ul style="list-style-type: none"> <li>• Diversity – ethno-specific services adequately funded, funded to expand</li> <li>• <i>Supporting ethno-specific initiatives in York Region</i></li> </ul>
<ul style="list-style-type: none"> <li>• Promote literacy</li> </ul>	<i>Not articulated</i>
<ul style="list-style-type: none"> <li>• Prevent domestic violence and abuse</li> </ul>	<ul style="list-style-type: none"> <li>• Prevention of domestic violence</li> <li>• Programs to address domestic violence</li> <li>• <i>Preventing and addressing domestic and family violence</i></li> </ul>

## **Appendix B**

### **Working Descriptions of the 2004 Funding Priorities**

The categories used to define funding priorities continue to be so broad that most organizations offer at least one program that could fall into one of the funding categories. It is important to confirm exactly what UWYR means by each of the categories – the definitions and expected outcomes must be specific enough to accurately measure impact.

The following ‘working descriptions’ are intended as a starting point for further discussions:

#### **Build strong, vibrant, healthy communities**

- get involved in public awareness
- increase profile of community needs and UWYR role in community
- advocate for social change
- increase public participation in community initiatives
- increase access to information
- information sharing
- show leadership in community initiatives
- try and influence decision makers for improvements to social programs and funding
- encourage and support partnerships and collaborative efforts
- explore new approaches
- increase access to resource material
- provide a strong, unified voice on key issues
- volunteer development, coordination, awareness
- youth programming
- recreation, leisure, arts and culture appreciation
- wellness
- community events
- skills/job training

#### **Support those who have mental health challenges**

- counseling services
- respite for caregivers
- crisis lines/service
- stresses on individuals and families
- intervention
- community education
- grief and bereavement
- suicide prevention
- school critical incident services
- parenting workshops
- developmental needs
- learning disabilities
- substance abuse and addiction
- early intervention

- behavioural management
- service coordination
- services for ethnic and cultural communities

#### **Address issues of affordable housing and homelessness**

- lack of shelters/beds in all parts of York Region
- lack of youth and family shelter services
- providing options and support to people at risk of being homeless
- community awareness
- subsidies for home ownership/rental–Habitat for Humanity programs
- reduce waiting lists
- full range of affordable housing options – size, location, tenure, cost
- alternative housing options
- supportive housing – mental health clients
- connection between high cost of housing and ability to buy food and clothing

#### **Provide services geared towards newcomers/immigrants**

- language training (ESL)
- service in various languages (translators and interpreters)
- access to information on community services
- settlement counseling and service
- diversity and cultural sensitivity training for the community
- education
- job skills training & professional status recognition
- culturally supportive counseling

#### **Promote literacy**

- school programs – reading and writing
- early intervention
- access to resources
- special services related to deaf and blind population (ASL and braille)
- ESL (English as a second language)
- Adult programs

#### **Prevent domestic violence and abuse**

- community awareness
- prevention
- shelters – crisis and transitional
- court support
- partner counseling
- sexual abuse counseling
- legal services
- victim support services
- services for ethnic and cultural communities

## Appendix C

### Current funding allocation comparison to 2004 priorities

UWYR currently assesses requests for new and/or expansionary funding against the stated funding priorities. Core funding to agencies is not assessed in this way. Allocation of new and expansionary funding has been very limited in recent years making an analysis of actual funding versus priorities very difficult.

For the purpose of this review, and to illustrate the concept of knowing where UWYR resources go, a preliminary analysis was completed. The categorization of agency programs and services is noted as subjective. Refinement of the analysis should take place during future discussions.

#### Summary of Preliminary Analysis

2004 Priorities	\$ Value of 2003/2004 Funding	% of Total 2003/2004 Funding
Strong Communities	\$1,694,569.00	44.44%
Mental Health	\$916,356.00	24.03%
Homelessness	\$348,149.00	9.13%
Newcomer/Immigrant	\$251,381.00	6.59%
Literacy	\$163,607.00	4.29%
Domestic Violence	\$438,958.00	11.51%
Total	\$3,813,020.00	100.00%

Agency	2003/2004 Funding (\$)	Preliminary Priority Assignment
Big Brothers Big Sisters	\$51,000.00	Building strong communities
Canadian Hearing Society – Simcoe York Region	\$173,080.00	Building strong communities
Canadian Mental Health Association - York Region	\$95,824.00	Mental health
Canadian National Institute for the Blind	\$130,798.00	Building strong communities
Canadian Red Cross Society - York Region Branch	\$128,833.00	Building strong communities
Carefirst Seniors & Community Services Association	\$42,760.00	Building strong communities
Catholic Community Services of York Region	\$62,286.00	Newcomer/Immigrant
Centre for Information and Community Services of Ontario	\$79,026.00	Newcomer/Immigrant
expansionary Youth Advancement and Development	\$19,117.00	Newcomer/Immigrant
Community Home Assistance to Seniors (C.H.A.T.S.)	\$116,688.00	Building strong communities
expansionary Adult Day Program	\$45,200.00	Building strong communities
Community Living Newmarket/Aurora District	\$110,096.00	Building strong communities
COSTI Immigrant Services	\$62,849.00	Newcomer/Immigrant
Family Life Centre (Richmond Hill, Newmarket)	\$312,148.00	Mental health
Georgina Association for Community Living	\$29,641.00	Building strong communities

<b>Agency</b>	<b>2003/2004 Funding (\$)</b>	<b>Preliminary Priority Assignment</b>
Georgina Family Life Centre	\$137,594.00	Mental health Building strong communities
Georgina Mobility Transit	\$40,800.00	Building strong communities
Girls Incorporated of York Region	\$90,798.00	Building strong communities
Helpmate Community Information and Volunteer Bureau	\$25,338.00	Building strong communities
Hospice Georgina/Chippewas of Georgina Island	\$37,128.00	Mental health Building strong communities
Jericho Youth Centre	\$86,494.00	Building strong communities
Jewish Family and Child Service	\$84,032.00	Mental health Building strong communities
Job Skills	\$82,720.00	Building strong communities
Learning Centre for Georgina	\$60,374.00	Literacy
Learning Disabilities Association (York Region)	\$75,163.00	Literacy
Markham Stouffville Family Life Centre	\$166,492.00	Mental health
Operation Catch-Up	\$88,444.00	Literacy
Pathways for Children, Youth and Families of York Region Inc.	\$36,572.00	Mental health Building strong communities
Rose of Sharon Services for Young Mothers	\$74,543.00	Building strong communities
Sandgate, Women's Shelter of Georgina	\$145,140.00	Domestic violence
The Vitanova Foundation	\$49,665.00	Homelessness Mental health
The York Centre for Children, Youth and Families	\$46,566.00	Mental health Building strong communities
Toronto Chinese Community Services Association	\$32,640.00	Building strong communities
Transitional and Supportive Housing Services of York Region	\$298,484.00	Homelessness
Victim Services of York Region	\$24,480.00	Domestic violence
Women's Centre of York Region	\$28,103.00	Domestic violence
Women's Support Network of York Region	\$28,103.00	Newcomer/Immigrant
Yellow Brick House	\$123,666.00	Domestic violence
York Region Abuse Program	\$117,569.00	Domestic violence Building strong communities
York Region Neighbourhood Services	\$117,292.00	Building strong communities
York South Association for Community Living	\$167,335.00	Building strong communities
Alzheimer Society of York Region	\$33,139.00	Building strong communities
Palliative Care Network	\$55,000.00	Building strong communities
	<b>\$3,813,020.00</b>	

## Appendix D Measuring Outcomes

Outcomes measurement is a key component of our Donor Accountability commitment. Early in this process a long list of potential measures and outcomes was developed. This was a shopping list that those with an intimate knowledge of UWYR felt should be measured in order to gain an understanding of organizational effectiveness.

Currently, UWYR has evaluation tools and processes in place to measure outcomes related to campaign success and volunteer satisfaction. Member agencies evaluate their impact and effectiveness related to core competencies and funding specific statistics. The agency outcomes measurement is part of the bi-annual funding process. However, the current evaluation tools do not measure the overall impact of funded programs according to the stated funding priorities.

The current process to set funding priorities has reinforced the need to improve evaluation of the **cumulative impact UWYR resources have in the community**. At some level, the return on funding allocated should be quantified.

Two opposing factors are at play in achieving this goal. There is a desire to measure outcomes as an essential part of donor accountability. However, there is a current lack of organizational infrastructure in place to carry out this kind of measurement.

To capitalize on the opportunity to begin measuring, a phased in approach is recommended. Initially, UWYR should measure its role in the community to gain an understanding of its effectiveness and to gain experience about which indicators are the most useful and practically measured.

An internal measurement process will set the stage to address the cumulative impact of resources allocated to the funding priorities.

The following information presents examples of outcomes, indicators, targets and timeframes that can be used to start the process. As the process of measuring outcomes is refined, key staff and other resources should also be identified.

### Examples of Outcomes Measurement Related to UWYR's Role in the Community

#### UWYR Role in Increasing Community Awareness

- A regular survey of York Region residents could be carried out to probe **how many people are aware of UWYR** (specifically activities surrounding funding priorities), and **are contributing to UWYR** either financially or by volunteering. The first survey would provide a benchmark. The **target** would then be to make measurable gains in increasing perception in each subsequent survey.

<b>UWYR Role</b>	<b>Outcome</b>	<b>Indicator</b>	<b>Target</b>	<b>Timeframe</b>
Fundraiser/fund distributor	Funds are available to accommodate all agency requests related to funding priorities	- Achieve annual fundraising goals	- 5-10% increase in funds raised annually - Set target for 2009	Measured annually
Profile	UWYR is seen as a leader in ensuring that human services needs in York Region are met	- UWYR media releases are carried in local outlets - York Region residents who work in other GTA municipalities are aware of social needs in their home community and designate their campaign pledge to UWYR	- All media releases are carried  - Random survey of residents shows that half of the population is aware of UWYR priority needs areas	Measured quarterly  Measured annually
Educator/Advocate for community needs	Existing human services needs in York Region are understood by the citizenry. All sectors are involved in real, tangible progress	- UWYR is participating in discussions with other key stakeholders about its priority funding areas	- UWYR has knowledge of and participates in some way on all relevant committees/panels, etc	Measured semi annually
Capacity builder	Human service agencies have trained, empowered staff and volunteers who effectively, efficiently deliver services to those in need	- Survey of member agency staff indicates that their situation has been improved through participation in UWYR training initiatives	- Each member agency can indicate at least one way that UWYR training has improved services to their clients	Measured annually

### **Outcomes Measurement Related to Funding Priorities**

The following **outcome** can be applied to most funding priorities: That those in York Region, who are in need, have access to timely, effective, local human services.

**Indicators** for measuring the total impact of UWYR resources in the community will have to be carefully chosen in order to be meaningful.

For example:

#### **Homelessness**

- Statistics provided by agencies providing shelter to homeless people indicate that the **number of beds available has increased** by x and the **number of nights agencies had to turn away clients** decreased from y to z. The **target** would then be to balance the number of beds available to the demand for service.

#### **Mental Health**

- The stigma traditionally attached to seeking mental health service has been reduced as indicated by an **increased request for service statistic** as provided by services agencies. The **target** would then be to ensure that waiting lists for service is reduced and maximum wait times are honoured.

It is suggested that additional relevant indicators, targets and timeframes be developed cooperatively with local human service providers (i.e. member agencies, Human Services Planning Coalition, etc.). That same group could be convened on a regular basis to discuss UWYR's progress towards meeting targets.