

S.L. Gimbel Foundation Grant Evaluation

Homeless Assistance Leadership Organization, Inc. (HALO)

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Grant Period Nov. 15, 2012-Nov. 30, 2013

Award Amount \$25,000

Grant #2012856

Goals and Objectives:

HALO's intent from day one was not only to house those in need of shelter but to identify and address causes of chronic homelessness. HALO is the only homeless shelter in Wisconsin offering Intensive Case Management paired with a comprehensive network of support services designed to promote self-sufficiency and accepting new clients 24-hours daily.

HALO's goals include maintaining or improving our client success rate; supporting our local economy by adding educated, skilled workers to the workforce; and to strengthening the community by supporting the healthy development of children, all while identifying and addressing root causes of homelessness. This is accomplished through our intensive case management program that uses a collaborative structure to coordinate existing support services for clients.

HALO defines client success by three variables: the successful completion of all goals on the client's Individual Success Plan as outlined by their Case Manager, the ability to maintain steady employment, and the transition into stable housing with enough income and savings to support themselves.

Last year, of the 461 adults who worked with a case manager to create their own Individual Success Plan, 217 of them moved into stable housing with enough income and savings to support themselves. This translates to a 47% success rate, much higher than the nation's average and 7% better than the year before.

Working with a case manager to address needs and identify goals, participants create their own Individual Success Plan. These plans provide a clear path to self-sufficiency by coordinating supportive services tailored to meet individual needs. Support services can include mental health counseling, addiction recovery, literacy and GED training, legal guidance, employment coaching, parenting lessons, health and nutrition guidance, financial counseling, and more.

For most, combatting homelessness hinges on the ability to find and maintain steady employment. HALO Case Managers support educational and vocational training goals designed to promote better job placement and employment retention. Supporting individuals who strive to better their economic health through education and skills building offers a more qualified work force and stronger economy for our community.

Each of our 217 successful clients worked closely with their case manager to tackle whatever obstacles and personal barriers were keeping them from maintaining steady employment. By

keeping a strict daily schedule, attending all required meetings and working toward the goals outlined on their Individual Success Plan, they were able to find success.

Program Outcomes:

- 416 adults residing at HALO worked with a case manager to create their Individual Success Plan outlining the steps needed to reach self-sufficiency. Of these participants:
- 88% showed measurable improvements in one or more area, up 6% from the year before.
- 97% of the parents in our Family Program increased their parenting skills
- 95% of the parents at HALO attended parenting courses and single parent support groups
- 100% of the children in our Family Program received medical exams complete with vision, hearing and dental screenings and updated immunizations
- 98% of our school-aged children attended school regularly
- 74% of the students staying at HALO demonstrated increased academic skills
- Last semester, of the 54 middle and high school students staying at HALO, 34 of them were on the honor roll

Challenges and Obstacles

Today, there is an emblematic shift in our financial future as government funding for HALO's emergency shelter has decreased by 78% in the last three years. HALO receives funding from HUD to support operations of our Transitional and Permanent Housing programs, but only 22% of the emergency shelter's budget is covered by government funds. Making up for the continual drop in public funding is our greatest challenge and our goal is to wean ourselves entirely from government funding.

The drop in funding included cuts to all emergency shelters, additional cuts due to sequestration, and a backup of cash flow due to furloughs. By July of 2012, deep funding cuts for all shelters had been announced by the federal government. We braced ourselves for a projected loss of \$70,000. Then the sequester came and the cuts became even deeper.

These cuts impact HALO's ability to provide services to our clients. For example, Racine's Safe Passage was forced to end operations when they did not receive their federal grant renewal. This service provider helped us provide transitional housing for young adults transitioning out of shelter. Similarly, the Center for Veteran's Issues lost transportation funding for our homeless veterans to access free services in Milwaukee. The clamp down on such service providers who are essential to HALO clients' success adds a new dimension to the definition of chronic homelessness.

Positive Outcomes

We learned that with the ability to be proactive rather than reactive, HALO staff and Board are capable of highly strategic planning and execution to gain outcomes greater than anticipated. With funding from the S.L. Gimbel Foundation, HALO staff and board members were given the freedom to better focus on ways to enhance and grow local funding programs within the community. Efforts were focused on building stronger relationships with community leaders and passionate individuals for long-term, sustaining financial support.

Appeals to increase individual support came through additional mailings, a newly designed website with a clear and easy way to donate online, and the design and use of a quick response

(QR) code directing smart phone users to online giving. The board implemented a Corporate Partners Initiative for small and medium size business to support HALO with a three-year pledge of financial support on top of our strong support from local major corporations. We currently have over \$60,000 in pledges. And in November of 2013, we will be launching our first ever, major event fundraiser: Sleep Out for HALO.

Lesson Learned

The best lesson came with the realization that HALO needed to restructure our current staff to give more responsibility to those capable of taking it on and to free up responsibility for those best suited to improving our community relationships and creating new funding possibilities. HALO's executive director is no longer in charge of daily shelter operations. With the restructuring, we now have an Executive Operations Director who shelter staff will report to. This allows the Executive Director to allocate more time and attention to the efforts of the Community Programs Manager and the Grant Writer/Marketing Assistant.

The Overall Effect

Due to the timing of the Gimbel funding plus the addition of unexpected gift from a local corporation, we ended this past fiscal year in the black! Having filled the funding hole created by government decreases allowed us the freedom to become more strategic and visionary with our local fundraising plans. This provoked a much needed reorganize of our agency with the creation of a team charged with implementing the plans, allowing shelter operations to keep running smoothly so that our case managers can better concentrate on their clients' needs.

Success Stories

Jonathan was a former heroin addict. HALO helped him to combat his addiction and maintain employment so that he could move to the Southwest to be with loved ones. On a recent visit back to Wisconsin, he stopped by the shelter to express his continual gratitude for helping him transform his life. Here is what he wrote on his exit questionnaire:

The positive way they push for you to believe in yourself is great. They all help if you are seeking help!! I understand the tough love aspect, and more importantly they set you up to succeed if you want to. I know that what they offer is great if you are striving for change.

Our most thrilling success story of late comes from a man who was caught in the revolving door of chronic homelessness for several years. HALO attempted to help him at least four previous times, but he would either break the rules, fail a sobriety test or simply just give up and leave. With each dismissal came growing frustration from both the client and the numerous HALO staff members who dedicated time to him.

It took no small amount of convincing for lead case manager, Floyd Harmon, to allow this man back in when he showed up at HALO once again. But even Floyd could tell something was different this time: a heartfelt determination. The client followed all the rules and maintained steady employment at a local grocery store where he received a promotion and was able to save over \$3,000 for his transition into stable housing. He even made amends with the landlord who had previously evicted him but now has offered him another lease after seeing his astounding transformation.

Witnessing this man's success created a great buzz among HALO staff members. His newfound enthusiasm and positive attitude towards life were shared as he hugged us all before leaving the shelter for good. Here is how he expressed his gratitude in words:

Special thanks to (Men's Lead Case Manager) Floyd Harmon for giving me one more chance to prove I could get it right. Thanks again to (support staff) Bruce Brown for convincing Floyd to give me that chance.... Thanks to (Community Programs Manager) Brenda Thomas for being the most inspirational ray of sunshine on every cloudy day.

Roger came to HALO's emergency shelter at the age of 92, suffering from dementia. His niece and nephew, his only living relatives were his primary care givers, but were suffering their own financial troubles due to job losses and drained Roger's savings and amassed debt in his name. HALO got Roger in touch with Legal Action of Wisconsin and his debt was erased. Roger's bank account is back under responsible control and he is now living in the assisted care of Lincoln Lutheran.

Debbie was married and pregnant before finishing high school. At just 23, she has three children and is divorced. Without a high school diploma, and no job skills, Debbie came to HALO determined to make a better life for her family. Working through her Individual Success Plan as outlined by her case manager, Debbie was put in touch with Racine's Family Literacy program and received her GED. Debbie's children are receiving quality care from HALO Childcare while she works part-time and continues her schooling. Today, she and her family live in one of HALO's Transitional Housing apartments and she is pursuing a nursing degree from Gateway Technical College.

John was desperate and suicidal when HALO's Outreach team found him. After two years in our programs, John has been holding down a part-time job and is just three classes away from completing his degree in Human Services from Gateway Technical College. Thankful for giving him a second chance at life, John returns to HALO on nights and weekends when he is not working to offer his time, support and inspiring story to others coming to the shelter for the first time.

Financial Report

A PDF of expenditures is attached. Grant funds of \$25,000 were used to support HALO's emergency shelter operations and self-sufficiency programs including intensive case management. HALO employs eight case managers. Specifically, \$15,000 of grant funds supported the Women's Lead Case Manager's salary and benefits totaling \$34,400 in 2012-13. In addition, \$10,000 offset the shelter's total utilities cost of \$53,600 in 2012-13.

Homeless Assistance Leadership Organization

Profit & Loss

July 2012 through June 2013
Jul '12 - Jun '13

Ordinary Income/Expense

Income

4010 • INDIVIDUAL CONTRIBUTIONS	187,313.86
4250 • NONPROFIT ORGANIZATION SUPPORT	77,357.15
4260 • CORPORATE FUNDING	139,491.94
4280 • FOUNDATION GRANTS	93,459.11
4430 • UNITED WAY	290,540.14
4480 • DONATED ITEMS AND SERVICES	305,451.60
4520 • HUD GRANTS	446,474.48
4525 • OTHER FEDERAL GRANTS	24,564.00
4530 • STATE GRANTS	24,139.43
4540 • LOCAL GOVERNMENT GRANTS	35,003.00
5001 • EARNED REVENUE	215,306.16
5490 • MISCELLANEOUS INCOME	3,538.54
5800 • SPECIAL EVENTS	34,059.22

Total Income	1,876,698.63
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Gross Profit	1,876,698.63
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Expense

6999 • Uncategorized Expenses	0.00
7050 • SPECIFIC ASSISTANCE FOR INDIV'S	10,962.50
7052 • HUD LEASES	280,361.01
7220 • SALARIES AND WAGES	788,528.28
7240 • EMPLOYEE BENEFITS	47,055.34
7250 • PAYROLL TAXES	76,003.20
7400 • OTHER PERSONNEL EXPENSES	3,181.81
7420 • CONTRACT EMPLOYEES	19,334.66
7500 • PROFESSIONAL FEES	14,961.26
7600 • SOCIAL ENTERPRISE EXPENSES	342.13
8110 • SUPPLIES	304,933.52
8130 • TELEPHONE & COMMUNICATIONS	9,665.86
8140 • POSTAGE, DELIVERY, & SHIPPING	14,030.75
8200 • OCCUPANCY EXPENSES	152,980.11
8310 • TRAVEL	10,448.89
8500 • MISC EXPENSE	0.00
8600 • BUSINESS EXPENSES	22,247.82
8700 • INSURANCE (NON-EMPLOYEE)	45,168.99

Total Expense	1,800,206.13
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Net Ordinary Income	76,492.50
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Other Income/Expense

Other Income

4700 • ENDOWMENT REVENUE	70,030.05
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Total Other Income	70,030.05
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Accrual Basis

Homeless Assistance Leadership Organization

Profit & Loss

July 2012 through June 2013
Jul '12 - Jun 13

Other Expense	
8800 · ENDOWMENT EXPENSE	6,076.67
8900 · DEPRECIATION & AMORTIZATION	93,746.04
Total Other Expense	99,822.71
Net Other Income	-29,792.66
Net Income	46,699.84