

Shared Access Trials

Monitoring and Evaluation Framework



Shared Access Trials

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Endorsed by Housing and Human Services Senior Officers Group on 11 April 2007

Table of Contents

| | | |
|----------|---|-----------|
| 1 | INTRODUCTION | 3 |
| 1.1 | AIMS OF THE SHARED ACCESS TRIALS | 4 |
| 1.2 | TARGET CLIENT GROUPS | 4 |
| 1.3 | IMPLEMENTATION OF SHARED ACCESS TRIALS | 5 |
| 2 | PURPOSE OF THIS FRAMEWORK | 5 |
| 3 | SCOPE OF MONITORING AND EVALUATION | 6 |
| 4 | OVERVIEW OF METHODOLOGY | 7 |
| 4.1 | BASELINE ANALYSIS | 7 |
| 5 | RESULTS LOGIC | 8 |
| 5.1 | ACCORD RESULTS | 8 |
| 5.2 | SHARED ACCESS TRIALS RESULTS | 9 |
| 6 | MONITORING | 11 |
| 6.1 | REGULAR DATA COLLECTION RE CLIENTS | 11 |
| 6.2 | DOH MANAGEMENT INFORMATION | 12 |
| 7 | EVALUATION | 13 |
| 7.1 | REVIEW OF QUANTITATIVE DATA | 13 |
| 7.2 | QUALITATIVE DATA COLLECTION AND ANALYSIS | 13 |
| 7.3 | ETHICS AND OTHER APPROVAL PROCESSES | 15 |
| 8 | REPORTING | 16 |
| 8.1 | MID-TERM REPORT | 16 |
| 8.2 | FINAL EVALUATION REPORT | 16 |

Annexes

- 1) Minimum Dataset
- 2) Client interview survey tool
- 3) Partner agency stakeholder online survey tool
- 4) Partner agency stakeholder structured interview schedule
- 5) Non-partner agency stakeholder interview schedule
- 6) Report format – outline
- 7) List of Shared Access trials
- 8) Draft consent form to participate in evaluation

1 Introduction

The Shared Access Trials are being established according to the parameters set by the Trial Shared Access Schedule, which is an attachment to the Housing and Human Services Accord. The Trial Shared Access Schedule commenced on 1 July 2006 for a period of 12 months, but due to delays in commencement of the trials, the trial period has been extended to March 2008.

The Accord aims to:

- Assist social housing clients with support needs
- Assist clients of human service agencies with housing needs
- Reduce social disadvantage in larger public housing estates

The purpose of the Trial Shared Access Schedule is “to develop, trial and implement agreed systems that assist mutual clients with complex housing needs”¹, thereby contributing to the aims of the Accord. Review of the trials and the Schedule will inform the development of the final Shared Access Schedule.

The Shared Access model is the first new partnership model developed under the Accord. The intent of the Trial Shared Access Schedule is stated as: “Agencies that are parties to the Trial Shared Access Schedule will work together to develop a system that utilises an agreed joint assessment process for the trial. This will include nominating clients for participation in the trial, allocating appropriate housing, supporting these clients for the agreed period, responding to the changing needs of these clients during the trial, reviewing the needs of trial clients at the end of the tenure period and developing exit strategies to other forms of housing assistance.”²

The aim of the Shared Access system is “to improve pathways for clients with complex housing needs into the social housing and support systems and pathways to other appropriate housing and support systems as indicated. The Shared Access system will increase the number of pathways for these clients and better link interagency coordination of social housing and support services. The Shared Access system will build shared responsibilities for **eligibility support[and] client reviews**”³

The Schedule states that the trial period for each project is limited to 12 months from commencement of the project, “but clients participating in the trial should have tenure and support periods matched to their needs rather than the period of the trial”⁴. Their tenure and support may extend beyond the trial period (tenants housed during the trial will have entitlements under the Residential Tenancy Act for the duration of their tenancy). The project may also extend beyond the trial period.

¹ Final Trial Shared Access Schedule (endorsed 14 June 2006), Page 2, Section 3

² Final Trial Shared Access Schedule (endorsed 14 June 2006), Page 3, Section 3

³ Final Trial Shared Access Schedule (endorsed 14 June 2006), Page 3, Section 5

⁴ Final Trial Shared Access Schedule (endorsed 14 June 2006), Page 3, Section 6

1.1 Aims of the Shared Access trials

The Shared Access System aims to⁵:

- Improve pathways for clients with complex housing needs into the social housing and support systems and better link interagency co-ordination of social housing and support services.
- Build shared responsibilities for determining eligibility, provision of support, and client reviews to meet changing needs.
- Enhance the quality of life and community participation of clients with complex needs.

Under the Schedule, a number of projects have been initiated to test the Shared Access system. Projects may be initiated by any Accord signatory agency who identifies a particular target group that may benefit from participating in Shared Access. Discussions are then held to identify the parameters of the specific project. A formal trial plan has not been developed. Rather, projects are being initiated gradually as opportunities are presented.

Some of the initiated projects have been approved by the Senior Officers Group and the Minister for Housing as official trials – a list of these is at Annex 7. Because projects are evolving gradually, those identified as trials are commencing at different times. The evaluation therefore will be for different time periods across different trials.

The key objective of Shared Access projects and those approved as trials is to review the Trial Shared Access Schedule and to enable recommendations to be made for the future direction of the Shared Access system and the refinement of the final Shared Access Schedule for statewide implementation.

In keeping with the purpose and intention of the Trial Schedule, it is expected that trials will result in improved sustainability of tenancies through appropriate provision of support, as well as improving working relationships and coordination mechanisms between partner agencies. At the local level, individual trials may also identify specific aims or objectives in addition to these endorsed ones.

1.2 Target client groups

The target client groups for the Shared Access projects/trials are people who have complex housing needs⁶. Target clients will fall into one or more of the Accord priority target groups which include:

- Homeless (or those at risk of homelessness)
- Frail elderly
- People with disability
- Young people <20 years without family supports
- Families with children
- Very low income (aged pensioners, unemployed, very low waged)

⁵ Final Trial Shared Access Schedule (endorsed 14 June 2006), Page 3, Sections 5 and 6

⁶ The term 'people with complex housing need' means people with complex needs who require assistance with their housing. They include individuals and households who may experience mental illness, physical or intellectual disability, acquired brain injury, cognitive impairment, behavioural difficulties, social isolation, family dysfunction and alcohol or other drug misuse, or combinations of these conditions.

The clients who participate in Shared Access trials are likely to fall into one or more of the following groups:

- People currently receiving services or support from a human service or Accord signatory agency who need stable housing.
- People with complex needs who have previously been unable to access social or public housing.
- People who require support in order to maintain stable housing.

1.3 Implementation of Shared Access trials

Shared Access trials or projects are being initiated jointly by agencies who have identified a target group in need of stable housing and support. Key steps in establishing projects are as follows:

- Negotiation of criteria for eligibility to participate in the project
- Identification of roles and responsibilities of partners
- Identification of a governance structure for the project, including communication mechanisms
- Negotiation of an operating agreement to include the above – this is guided by the Operating Agreement Checklist and is signed by all partners
- Development of an assessment process to assess eligibility of nominated clients
- Development of a client information sharing protocol
- Agreement to monitoring and evaluation processes and methods

It is noted that as part of the Accord, a joint assessment framework, complex housing needs screening tool, and client information sharing protocol are being developed for statewide use. However, as these are still under development, each project is developing its own tools and processes. Lessons learned from these may inform the development of future statewide systems.

2 Purpose of this Framework

The purpose of this Framework is to provide a consistent approach to the monitoring and evaluation of the Shared Access trials so that sufficient data and information is captured to review the Trial Shared Access Schedule and inform the expansion of the Shared Access model as part of ‘business as usual’. Lessons learned will also be used to inform best practice guidelines.

An overarching Monitoring and Evaluation Framework is being developed for the Accord as a whole. As part of this, state-level results indicators and performance measures have been drafted and key evaluation questions identified. This Shared Access Monitoring and Evaluation Framework is a component of the overall Accord Framework, and will provide data against the Accord results indicators and performance measures as well as contributing to analysis of the implementation of the Accord as a whole. The Shared Access trials are the first phase of Accord implementation and their evaluation corresponds to the first phase of the evaluation of the Accord.

Through the Trial Shared Access Schedule, the signatory agencies have committed to participating in the monitoring and evaluation of trials. The Schedule makes it clear that agencies are responsible for collecting and reporting on outcomes for their clients relevant to their area of responsibility. Where funded NGOs are involved in a partnership agreement, this

commitment is expected to be upheld and these NGOs are also key stakeholders for the purpose of evaluation.

This Framework sets out the proposed minimum monitoring and evaluation requirements to enable effective review of the Trial Shared Access Schedule and also inform the overall monitoring and evaluation of the Accord.

3 Scope of monitoring and evaluation

Monitoring of the Shared Access Trials will set out to identify whether the trials are doing what the Schedule intends them to do. Data therefore needs to be collected regularly to inform review of ongoing progress and provide the opportunity for continuous improvement, through an action learning approach, as is identified in the Schedule⁷. The appropriateness of project processes and service delivery should be reviewed on an ongoing basis.

Evaluation methods will set out to identify whether the trial projects met objectives, what benefits were realised, and an analysis of issues and lessons for future partnership development, and expansion of Shared Access.

Key overarching evaluation questions to test out the aims of the Schedule (Section 1.1) include:

- Does the Shared Access system improve pathways for clients with complex housing needs into the social housing and support systems?
- Does the system improve agency coordination of social housing and support services and enhance shared responsibilities for determining eligibility, providing support and client reviews?
- Does the system enhance the quality of life and community participation of clients with complex housing needs?

Additionally, the following will be analysed:

- What organisational processes, structures and tools have facilitated establishment of effective partnerships for improved client outcomes?
- What organisational barriers have prevented effective partnership?
- What policy, planning and operational changes may be required to support provision of Shared Access using a partnership approach?
- Are different approaches required for different agencies, and/or for different client groups?
- What are the key success factors in provision of housing and support to improve client outcomes?

The above questions are reflected in the results logic in Section 4 and are to be explored through the methodology described in this document.

⁷ Final Trial Shared Access Schedule (endorsed 14 June 2006), Page 3, Section 6

4 Overview of Methodology

The methodology and approach to monitoring and evaluation of the Shared Access trials is based on Friedman's Results-based Accountability (RBA). RBA is a planning tool that identifies desired results at the population level (population accountability) and desired performance results (performance accountability) i.e. the intended results for the actual clients of the services being provided.

It is therefore important that Projects are well planned from the outset to identify intended results at a population and performance level. Part of Project development should include a planning workshop that identifies the objectives for the project, simply:

- What does the project aim to achieve?
- What is expected to change for tenants/clients as a result of the trial, and how will we know if this change has occurred?
- How will we get there?

These objectives will be consistent with the aims of the Trial Shared Access Schedule but may be tailored to specific client groups e.g. expected change for ex-offenders is reduced re-offending.

Identifying intended results is the first step to identifying project-specific performance measures (consistent with the ones above as well as any additional ones). Initiation of a Shared Access project is then formalised in an Operating Agreement, signed by the partner agencies – this confirms the intended results (outcomes) and also includes a commitment to participation in monitoring and evaluation processes, and the collection of required data.

The RBA approach holds that monitoring and evaluation of the identified intended performance results should essentially answer 3 basic questions:

- 1) What have we done? E.g. what services delivered
- 2) How well have we done it? E.g. quality of services delivered
- 3) Is anyone better off? E.g. client satisfaction/well-being

The table presented in Section 5 is based on this approach and identifies performance measures that answer these questions. A number has been placed against each performance measure that shows its relationship to the 3 questions above.

More information on the specific methodology for monitoring and evaluation is provided in Sections 6 and 7.

4.1 *Baseline Analysis*

To measure the success of Shared Access trials individually and overall it is necessary to establish a baseline picture of the target groups for each trial. The baseline needs to be identified in relation to the results indicators and performance measures in Section 5. Baseline information should also identify:

- What is the current status of the project target group in relation to housing and support needs; and ability to sustain a tenancy?
- What is currently being done to assist this target group with housing and support?
- What works well – i.e. what good practice approaches should be replicated?

Baseline information enables a comparative starting point for projects, enabling measurement of success achieved. Baseline information also enables identification of needs, and helps to identify approaches to implementation.

The baseline information available will vary from group to group because of the differing information requirements, data availability, and agencies involved. Each trial will need to agree on the baseline information it intends to collect. This might include some or all of the following:

- Selected demographic information (as is relevant to the specific project) where this exists e.g. population group figures, income levels, health indicators, crime levels etc.
- Service provision profile data from partner agencies e.g. current level of service provided to a particular group e.g. hours of counselling support or respite etc.
- Current social housing profile for target group
- Current levels of housing stability eg rate of transfers, previous length of tenancy.
- Description of how the current service system responds to the needs of this group.
- Synopsis of recent research findings nationally and internationally regarding housing and service needs of the particular group targeted.
- Similar projects or service initiatives that could inform establishment of the partnership.
- Current policy, planning and operational context identifying issues which might impact on the potential success of the trial e.g. changes to introduction of fixed-term renewable tenancies, reconfiguration of ranking systems.

The above baseline analysis will need to consider existing research already undertaken by the Department or other agencies regarding specific client groups or localities.

It may be necessary to commission external research to undertake some baseline analysis.

5 Results Logic

5.1 Accord Results

As stated above the results indicators and performance measures for Shared Access trials need to be consistent with overarching Accord aims.

Draft result indicators and performance measures have been identified for the Accord and have been endorsed by the Housing and Human Services Senior Officers Group (SOG) for further refinement. The table below identifies the current draft Accord result indicators and performance measures.

| Accord (Population level) – Intended Results | Result Indicators | Source of data/information |
|--|--|----------------------------|
| Complex housing needs are met | Fewer people in NSW with unresolved complex housing needs | TBC |
| ↑ ↑ ↑ | | |
| Accord Performance – Intended Results | Performance Measures | Source of data/information |
| Tenancies successfully sustained and client wellbeing improved | <ul style="list-style-type: none"> • #/% clients who maintained fixed term tenancy during past 12 months (3) • #/% clients who reported improved wellbeing and satisfaction with housing and support (3) • #/% clients with support agreement aligned to needs (1) • Average waiting time (2) • Average arrears (2) | TBC |

5.2 Shared Access Trials Results

All activities under the Accord, including Shared Access trials or projects need to demonstrate a contribution to the Accord intended results.

The tables below show **proposed** results and performance measures for Shared Access trials/projects – these are consistent with the Accord results above. These have been developed as a result of workshops with two Shared Access projects that have already commenced. They draw on the stated intentions of the Trial Shared Access Schedule as well as ensuring they relate to the broader aims of the Accord.

It is **proposed** that the project indicators and measures below will form the basis of data collection in each Project, but project partners may also identify additional intended results and indicators/measures. The partners in each Project should negotiate and agree on the data to be collected to inform the proposed indicators and measures below.

| Project Population – Intended Result | Result Indicators | Source of data/information* |
|--|---|--|
| Complex housing needs for the project target population are met – <i>each project is to define its target population</i> | Fewer people in the project target group with unresolved complex housing needs – <i>as defined by project</i> | Data to be sourced from relevant agency for the target group |



| Project Performance – Intended Results | Performance Measures | Source of data/information* |
|---|---|--|
| Clients with complex housing needs are provided with timely and appropriate access to housing | <ul style="list-style-type: none"> • # clients housed and supported (1) • # appropriate nominations made (2) • # appeals (2) • Average waiting time for nominated applicants (time between nomination approval and allocation of property) (2) • # appropriate housing allocation (2) | DOH/CHP data spreadsheet to record: <ul style="list-style-type: none"> • No. of clients nominated and accepted/refused and reasons why • Any appeals launched • Date of nomination approval • Date of property allocation • Property location (and if on an estate) |
| Clients are able to sustain tenancies | %/# who sustain a tenancy (3) – may include: <ul style="list-style-type: none"> • #/% clients who maintained tenancy for term of lease (or exited to a more stable situation) • #/% of clients in rental/water arrears (by time period or dollar amount?) • #/% of tenancies where eviction action was commenced • #/% clients causing damage to property • #/% clients involved in nuisance and annoyance | DOH/CHP data spreadsheet to record <ul style="list-style-type: none"> • Date of lease commencement/end • If applicable, date of early exit from lease and reason • If applicable, date of transfer request and reason, and outcome • Any periods of arrears • Eviction action and reason • Property damage • Incidents of nuisance and annoyance |
| Client wellbeing is improved / quality of life and community participation is enhanced | <ul style="list-style-type: none"> • Support provided matches identified needs and responds to changing needs (2) • #/% of clients in the Project who report improved wellbeing and | <ul style="list-style-type: none"> • Case plan meets identified needs (review of case plan against original assessment - by agreed party) • Evidence of review of |

| Project Performance – Intended Results | Performance Measures | Source of data/information* |
|---|--|--|
| | satisfaction with housing and support; and enhanced community participation (3) | changing needs e.g. review of the client’s case plan ⁸ <ul style="list-style-type: none"> • Client survey |
| Client ability to live independently is improved (<i>this way this is defined will vary between target groups</i>) | Depending on target group: May consider <ul style="list-style-type: none"> • Reduction in hours of support needed from case manager (3) • Reduction in hours of contact with housing client service officer (general or specialist) (3) • Reduction in occurrence of crisis events – this will differ for client groups e.g. for ex-offenders could be reduction in recidivism (3) • Increased access to universal services (3) • Increased community participation (3) • # clients with exit plan developed prior to lease end (3) | Support agency data spreadsheet to record: <ul style="list-style-type: none"> • Hours of support per month • Progress of client against goals • Occurrence of crisis events • Access of client to universal services • Evidence of exit planning DOH/CHP data spreadsheet to record: <ul style="list-style-type: none"> • Hours of contact with client service staff, either general or specialist • Exit products offered Client survey <ul style="list-style-type: none"> • Ask about access to universal services; community participation |
| Agencies involved report improved service delivery through partnership model, including improved coordination and shared responsibilities | <ul style="list-style-type: none"> • #/% of staff involved in the partnership who report (2): <ul style="list-style-type: none"> ○ better understanding of other agencies involved ○ improved relationships with other agencies ○ improved service delivery and coordination ○ shared responsibilities between agencies ○ improved outcomes for client ○ increase in skills and/or knowledge gained • Evidence of partnership development and maintenance (2) | Stakeholder survey/interviews – Ask about: understanding of other partners; relationship; perception of client outcomes; issues re skills, workload impacts Review of documentation e.g.: <ul style="list-style-type: none"> • Operating agreement • Governance agreement • Communication protocols • Tools (developed for projects) • Minutes of project meetings including issues logs and resolution of issues |

* **Annex 1** provides a summary of the Minimum Dataset required to enable the above indicators and measures to be used.

- DOH or Community Housing Provider staff at the project level are responsible for filling in the DOH/CHP data spreadsheet.
- Partner agency staff at the project level are responsible for filling in the support agency spreadsheet. Where support has been contracted through an NGO, the partner government agency needs to ensure the NGO will provide the data.

⁸ It is expected that the client will have one case plan, developed and managed by their key case manager from the support agency.

6 Monitoring

Monitoring enables the ongoing collection of data to reflect on project progress and enable improvements to processes, and also provides data that can be used in outcome/impact evaluation. The responsibility for monitoring is shared by the staff involved in the project.

6.1 Regular Data Collection re Clients

As indicated above, the planning stage of a project should ensure agreement on intended results (outcomes) and set the stage for development of appropriate performance measures and data requirements. The Operating Agreement commits partners involved in a project to participating in a workshop to refine the measures and agree on data collection methods and formats for that project, and confirm reporting frequencies. This Framework should inform the workshop.

Partner agencies responsibility: Project partners at the local level need to negotiate and agree on delegated responsibilities for collection of data. This is likely to be a case manager, or other staff member with direct client contact.

For DOH and CHP data which will be consistent across trials/projects, it is proposed to develop a template that will be used by all trials.

For partner agency data regarding support to clients, agreement should be reached on formats for collection and presentation of the agreed data to the DOH-Housing Partnerships team, as well as agreement to access other documentation, as indicated in Section 5 above in the data source column. It is proposed to develop a template for use by agencies.

Information sharing parameters need to be agreed upon, as well as mechanisms for safeguarding data and ensuring client confidentiality and privacy. To emphasise the importance of information sharing in the success of the Accord, the SOG has made a commitment to an Accord client information sharing schedule, currently under development.

An indicative workshop format would include discussion on:

- Confirmation of the population group that is targeted and the outcomes the project seeks to achieve, as per the project planning stage.
- Agreement on what information is required for the baseline.
- Discussion and agreement re the indicators and measures in Section 5.
- The data and information each partner agrees to collect and in what format.
- Any gaps in data and information that require additional collection processes
- Responsibilities for collection of data and information.
- Opportunities for sharing data and information.
- Reporting processes.
- How the data and information will be used for monitoring and continuous quality improvement, as well as for evaluation.

The workshop process requires the input of the staff from each partner agency who will operationalise each project, ensuring best use of their knowledge and experience around the particular target group and current data collection and reporting mechanisms within their organisations.

The workshop process will also facilitate understanding between partners of their differing roles, data collection requirements and approaches. Each workshop will be facilitated by the Department of Housing who will document the final agreed monitoring and reporting requirements for each project. This will form an attachment to the Operating Agreement. As well as providing the data collection and reporting requirements for individual projects these documents will be used to assist establishment of new projects.

Data that is gathered from the individual Shared Access trials, as identified in this Framework, will be aggregated in order to identify patterns or practices across all the Projects, and reflect on their contribution to state level indicators and measures. However, given the small number of clients in the pilot projects, the contribution to State population results is not expected to be significant.

Key tools to be developed:

- Data recording formats to be developed – one for housing data, and one for support data

Key outputs:

- Quarterly data reporting from DOH and partner agency staff to DOH Housing Partnerships team in agreed format against the minimum dataset and additional data agreed upon
- Analysis of information by DOH Housing Partnerships team

6.2 DOH Management Information

The Accord team including the Head Office Housing Partnerships team and Divisional Accord Coordinators, when appointed, as well as project management staff in the Office of Community Housing, will continue to be involved in establishment of Shared Access trials throughout 2006/07. As part of this role they will report on progress and key outcomes for each project.

This will provide qualitative information on the:

- Development and usefulness of tools to assist with client assessment, decision-making, information sharing, communication and so on, that improve effectiveness of individual projects.
- Potential for transfer/adaptation of any tools developed to other projects.
- Obstacles or barriers experienced in partnership development and how these were resolved.
- Views of partner agencies participating in the project on the effectiveness of policy, processes or tools developed by the SOG or individual partners which aim to support operation of the Shared Access trials such as the Assessment Framework, the Operational Agreements etc.

The Accord team will be asked to record the above information and will also be interviewed as key stakeholders as part of evaluation.

Key tools:

- Accord Team Project Information Records (to include Project Brief, issues logs and other documentation)

7 Evaluation

Evaluation focuses on analysis of data and in-depth qualitative analysis to identify performance results and impacts, and causative factors, and the contribution of performance results to population results.

Evaluation will involve a number of methods as set out below. DOH will contract an independent consultant to conduct the evaluation.

7.1 *Review of Quantitative Data*

The data collected throughout each project will be reviewed to identify trends and links between tenancy outcomes and other factors, including support, location, demographic information and so on. It is hoped that some comparison can be made across pilots in relation to the amount and type of support and outcomes for clients, however it is recognised that because of many variables between projects, comparison may not always be possible.

Quantitative data will be assessed against relevant baseline and normative data, where it is available (see [Section 4.1](#)).

Partner agency role: As indicated in Section 6, partner agencies will collect regular data in an agreed format. The consultant will analyse this data.

7.2 *Qualitative Data Collection and Analysis*

Qualitative data analysis will be undertaken through a number of processes in order to analyse any apparent trends/causative factors in the quantitative data and to explore key evaluation questions in more depth. It is proposed that an independent evaluator will undertake qualitative data collection and analysis as detailed below. Partner agencies will need to assist in facilitating this by making information available, and being available for interviews.

Client Surveys

Information from clients will be gathered through a structured interview that will identify:

- The level of satisfaction of clients in relation to the housing and support services provided through partnerships and
- The impact of the services delivered on the health or wellbeing of clients.

The evaluation interview will ideally be conducted at 12 months of entry to the project. This aligns with the average support period and also provides sufficient time to identify whether clients have been able to reduce the need for support.

Ideally, baseline information in relation to clients' current circumstances, need, quality of life and expectations of the project should be incorporated into the initial assessment for their entry into the Project so that the evaluation interview can compare outcomes with this information.

A draft structured survey to be delivered by interview has been developed – see **Annex 2**. This survey has been developed through consideration of the HASI client survey, National Social Housing Survey and Assisted Tenancy Pilot survey (DOH).

Partner agency role: The key case manager for each client will need to ensure the client has provided consent and assist the consultant to make contact to set up an appointment with the

client. Consent will be obtained, consistent with legislative requirements which includes the use of interpreters, as necessary.

Tool:

- Consent to participate in evaluation (Annex 8)

Partner agency stakeholder surveys/interviews

Information regarding the operation of partnerships will also be gathered through surveys/interviews with partner agency stakeholders – i.e. government or non-government agencies who are a signatory to the operating agreement. Information will seek to identify:

- Impact on partners' understanding of other partner organisations
- Information sharing practices between partners
- Strengths and weaknesses of partnership models
- Changes in policy or practice resulting from involvement in partnership approaches
- Tools or processes developed that facilitated provision of services
- Barriers to practice or service provision, including identified skills gaps for staff
- How work practice and resources used in the project differs from 'normal' practice.

It is proposed that two methods are used:

- 1) A brief (5-10 minute) online survey to be filled in by all staff involved in projects within 3 months of commencement of the project, and at 12 months. Questions will focus on satisfaction with project management, communication, relationships, and information sharing, and will enable a quantitative snapshot of perceptions. See **Annex 3** for proposed draft.
- 2) Structured in-depth interviews on the functioning of the partnership and critical success factors – to be undertaken at the end of 12 months of the trial, or at the end of the Shared Access schedule trial period, whichever comes first. See **Annex 4** for proposed draft of the interview questions. An alternative approach to gaining this information is to do a focus group with each agency rather than individual interviews – feedback is sought from agencies on the preferred approach.

Partner agency role: Staff involved directly and indirectly will be asked to fill in a 5 minute online survey. They will also be asked to participate in an in-depth interview of 1-2 hours.

Non-partner agency stakeholder interviews

Most projects will also involve agencies who are not actually partners – i.e. they are not signatories to the operating agreement, but may have a substantial role in providing service. For example in one current project, an organisation has provided temporary accommodation and support pending allocation of the DOH property – this organisation has been identified by project partners as a key stakeholder. Project partners will identify who relevant stakeholders are at the data workshop. These stakeholders will be interviewed in relation to the following issues:

- The nature of their involvement and their perception of its usefulness for client outcomes
- Any issues regarding their relationship with partners in the project; any positive or negative views on working arrangements
- Any suggestions for improvements in service delivery to the client group

See proposed interview questions at **Annex 5**.

The information that will be gathered through all of the above surveys/interviews is a critical part of evaluation for each partnership project while also informing the ongoing development and replication of Shared Access and other partnership models.

Key tools requiring finalisation are:

- All the survey/interview tools referred to above require discussion and refinement

Documentation review

As indicated in Section 4, the means of verification for some performance measures will be through documentation review in order to gain insight into ongoing processes during the project and what contribution these have made to client outcomes. Documentation that will be reviewed to answer evaluation questions and provide information against measures will include:

- Operating agreements – review to identify whether key elements have been included and commitments adhered to; review of appropriateness of the format for future use
- Meeting minutes – review of issues, resolution, review of compliance with operating agreement
- Process documents (assessment forms etc) – review for usefulness – cross check through interviews.
- Review of case plans against assessment – did case plans reflect identified needs? Cross check through interviews whether case plans were implemented effectively
- Overall usefulness of all documentation in relation to effective implementation of the Schedule

Partner agency role: Key project contacts in partner agencies will be asked to provide copies of relevant documentation to the consultant.

7.3 Ethics and Other Approval Processes

To order to undertake the above evaluation research (interviews, documentation review), some agencies require specific approval processes to be adhered to. For example, the Department of Corrective Services requires that all research be approved by an Ethics Committee. Other agencies also have Ethics Committees.

In addition, some agencies have specific requirements in relation to the qualifications of the consultant/s. The consultant/s may be required to: get police clearance, working with children check, sign a confidentiality agreement, and obtain the consent of a parent/guardian/advocate where relevant.

Each agency is to provide specific information on these requirements. Key project contacts from partner agencies will be asked to assist the consultant to access the necessary forms to meet requirements.

Interagency agreement is also required on these tools before they are utilised. The client survey tool may need to be amended for specific target groups, depending on the circumstances of their entry to the project, and also on their capacity to understand the questions (e.g. for people with intellectual disability).

8 Reporting

8.1 Mid-term report

A mid-term review report will be presented to the SOG. The report will provide a progress update of trials undertaken to-date as well as any barriers identified for individual projects or the Shared Access approach as a whole. This report will provide information to guide the future work of the SOG in facilitating development of the Shared Access approach and other partnership models in the delivery of housing and support services.

Key output:

- Mid-term review report

8.2 Final evaluation report

A final evaluation report will be produced by the consultant. Out of this evaluation it is intended that recommendations are formulated for best practice and that best practice guidelines are then developed for the establishment, implementation, maintenance and evaluation of Shared Access and other partnership projects. Guidelines should include sections on issues for specific client groups and key operational processes for DOH staff e.g. in relation to evictions.

Key outputs:

- Final evaluation report including recommendations for finalisation of the Shared Access Schedule
- Best practice guidelines for Shared Access
- Learning and Development Strategy for Shared Access

Tool to be developed

- Report format

Annex 1: Minimum Data Set

Below is a summary of the minimum data required for collection by partnership project teams for the purpose of monitoring and evaluation, as presented in Section 4.

Data required from Department of Housing and participating Community Housing Providers

Baseline data for each project (DOH and CHP)

- Current numbers of clients in project target group – on register, in tenancies
- Length of waiting time for clients in that target group
- If project is locationally based – look at data for client group within that location if possible
- Current tenancy outcomes for the client group: arrears, length of tenancy, reason for leaving (voluntary/involuntary), property damage, anti-social behaviour, transfers
- Existing projects or initiatives that focus on this target group, and information on what works well/what doesn't

Research to be undertaken by DOH

- Synopsis of recent research findings nationally and internationally regarding housing and service needs of the particular group targeted.
- Similar projects or service initiatives that could inform establishment of the partnership.
- Current policy, planning and operational context identifying issues which might impact on the potential success of the trial eg changes to introduction of fixed-term renewable tenancies, reconfiguration of ranking systems.

Data on clients not accepted into project

- Numbers of clients not accepted into project
- Reasons for non-acceptance of nominated clients
- Housing outcomes for non-accepted clients if known (i.e. if they are offered another housing product outside the Project)

Data on clients accepted into project

- Demographic information: gender, cultural background, Indigenous status, age
- Former tenant category, if applicable. If category is “unsatisfactory”, reasons.
- Date of accepting nominated client into project
- Date of allocation of property
- Location of property (and whether on an estate)
- Waiting time between acceptance and allocation
- Lease start and end dates
- Rent and water arrears
- Number of nuisance and annoyance complaints
- Status of property condition (i.e. whether satisfactory/unsatisfactory)
- Number of contact hours between clients and Client Service Officers (general and specialist) per month per client
- Number of transfer requests, reasons for requests, outcomes of requests
- Date of exit from tenancy or project and reasons
- Details of any other housing-related product provided on exit, if relevant

Data required from key referring and support agency/ies (either government or NGO)

Baseline information

- Selected demographic information (as is relevant to the specific project) on client group for that location where this exists eg population group figures, income levels, health indicators, crime levels etc.
- Service provision profile data from partner agencies eg current level of service provided to a particular group say, hours of counselling support or respite etc.
- Current issues with housing for this target group.
- Description of how the current service system responds to the needs of this group.
- Synopsis of recent research findings nationally and internationally regarding housing and service needs of the particular group targeted.
- Similar projects or service initiatives that could inform establishment of the partnership.
- Current policy, planning and operational context identifying issues which might impact on the potential success of the trial.

Data on clients not accepted into project

- Number of clients nominated to project and not accepted, and reasons. Outcomes for these clients, if known (e.g. entry to another program or housing opportunity)

Data on clients accepted into project

- Key complex needs of client (should be identified and documented in assessment)
- Date of commencement of support agreement/case plan, and agreed end date
- Date of exit from agreement if earlier than planned, and reasons
- Key goal areas that clients have set goals in
- Status of progress against goals on a regular basis (to be negotiated)
- Number of contact hours between support worker and client per month
- Key support services being provided monthly
- Access of client to universal services
- Crisis events experienced by client during support agreement period, and response to these e.g. financial crisis, offending behaviour, D&A relapse, emotional crisis, mental health hospitalisation (subject to client consent to share this information)
- Exit planning details

Additional data for specific client groups

Data required from DCS and DJJ for Ex-offenders

- Level of risk (DCS-LSRI)
- Number of previous sentences
- Length of time client out prior to current sentence
- Accommodation prior to current sentence
- Employment prior to current sentence
- Programs completed during current sentence
- Release date
- Period spent in temporary accommodation after release (before allocation of DoH property)

Document checklist to be available for evaluation

- Operating agreement (signed)
- Governance agreement
- Communication protocols
- Service level agreements (signed)
- Case plans
- Any tools used in project e.g. assessment proforma
- Client assessments undertaken for entry into project
- Minutes of meetings including issues log
- Correspondence in relation to issues resolution

Annex 2

Housing and Human Services Accord

Shared Access/Partnership Project

Client Satisfaction and Well-being Survey

To be administered by interviewer. Introduction:

This interview is being conducted as part of the XXXX Project to find out how satisfied you are with the housing and support provided, and to find out how you feel about your life. The information you provide is totally confidential. No one will be identified by name or place of living. The information will be incorporated into an evaluation report. None of your comments will be identified to service providers. We will use the information you provide to improve services.

| | |
|------------------------|--|
| Project name: | |
| Client number: | |
| Date completed: | |

How long have you been living in this current accommodation? _____

Is this the only place you have lived in? _____

(if not, prompt for explanation) _____

1 Client well-being

a) Has living in this property with support provided by [XXXX] helped you or your household with any of the following? ¹

[interviewer tick any that apply]

| | Yes it has helped 1 | No it hasn't helped 2 | It hasn't helped yet but it might in the future 3 | Does not apply to me/my household 4 |
|---|--------------------------------|----------------------------------|--|--|
| Feel more settled in general | | | | |
| Enjoy better health | | | | |
| Be more able to cope | | | | |
| Feel part of the community | | | | |
| Be able to continue living in this area | | | | |
| Manage rent/money better | | | | |
| See an improvement in job situation (e.g. get a job/better job/second income) | | | | |
| Start or continue education/training | | | | |
| Have better access to services you need | | | | |
| Feel that you have a better future | | | | |

¹ Qn 24 from National Social Housing Survey

b) How much has living in this property/ participating in this project changed your [or your household's] overall quality of life?²

Tick one box only.

| | |
|---|--|
| It has improved a lot (1) | |
| It has improved it a little (2) | |
| It hasn't really made any difference (3) | |
| Some aspects have improved while others are worse (4) | |
| It has worsened (5) | |
| Don't know (9) | |

c) Depending on the answer above, ask:

What do you think has been the most useful thing in helping you improve your quality of life?

OR

What do you think has prevented you from improving your quality of life?

d) If you had not been given the opportunity to live in public housing [community housing], where do you think you would be living right now?

| | |
|-----------------------------|--|
| Private rental | |
| With family or friends | |
| Boarding house | |
| Caravan park | |
| Refuge/crisis accommodation | |
| Homeless/sleeping rough | |
| Don't know | |
| Other – please specify | |

² Qn 25 from National Social Housing Survey

2 Satisfaction with Housing and Support

As you know, you have been able to access public [community] housing with support provided by [XXX] as part of this [XXXX] project.

This part of the survey is to determine how you feel about your housing and support, and the management of the Project. As stated before, the results will be kept strictly confidential and will be used for project evaluation purposes only.

2.1 Satisfaction with the service provided by DOH [CHP]

The following questions are about your satisfaction with the service provided by the Department of Housing [Community Housing Provider]. [for each project need to specify who the provider is]

a) How satisfied or dissatisfied are you overall with the service provided to you by the DOH [CHP] since you moved into this property?

| | |
|--|--|
| Very satisfied (1) | |
| Satisfied (2) | |
| Neither satisfied nor dissatisfied (3) | |
| Somewhat satisfied (4) | |
| Very dissatisfied (5) | |
| Don't know/no opinion (9) | |

b) In relation to the service provided by DOH [CHP] how satisfied or dissatisfied are you with the following:

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Somewhat dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|---|--------------------|---------------|--|---------------------------|-----------------------|--------------------------------------|
| i) The availability of clear information from DOH (CHP) about things you need to know | | | | | | |
| ii) The way you are treated by DOH (or CHP) staff? | | | | | | |
| iii) The way DOH (CHP) handles private information about you? | | | | | | |

c) Since you moved into this property, have you had any maintenance issues? [prompt e.g. broken stove, gas leak, leaking tap, blocked toilet]

Yes/No

d) If yes, did you contact the DOH [CHP] to get it fixed?

Yes/no

If not, why was this?

e) If yes, how satisfied were you with the way the DOH [CHP] responded to the maintenance problem?

| | |
|--|--|
| Very satisfied (1) | |
| Satisfied (2) | |
| Neither satisfied nor dissatisfied (3) | |
| Somewhat satisfied (4) | |
| Very dissatisfied (5) | |
| Don't know/no opinion (9) | |

f) If you were not satisfied with any of the above [prompt – service, way you were treated etc], would you know how to make a complaint?
Yes/No

Do you have any further comments about the Housing Provider?

2.2 Satisfaction with your home

The following questions are about your satisfaction with the accommodation provided by the Department of Housing [Community Housing Provider].

a) How satisfied or dissatisfied are you with the overall condition of your home?³

| | |
|--|--|
| Very satisfied (1) | |
| Satisfied (2) | |
| Neither satisfied nor dissatisfied (3) | |
| Somewhat satisfied (4) | |
| Very dissatisfied (5) | |
| Don't know/no opinion (9) | |

³ Qn 3 from National Social Housing Survey

a) In relation to your home, how satisfied or dissatisfied are you with the following⁴

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Somewhat dissatisfied (4) | Very dissatisfied (5) | Don't know/ no opinion (9) |
|---|--------------------|---------------|--|---------------------------|-----------------------|----------------------------|
| i) The overall condition of the inside of your home | | | | | | |
| ii) The overall condition of the outside of your home | | | | | | |
| iii) The amount of privacy you have | | | | | | |
| iv) The security of your home | | | | | | |
| v) The location of your home | | | | | | |

b) What do you like most about your home?

c) What do you like least about your home?

2.3 Neighbourhood

| | Strongly Agree (1) | Agree (2) | Neither Agree nor Disagree (3) | Disagree (4) | Strongly Disagree (5) |
|--|--------------------|-----------|--------------------------------|--------------|-----------------------|
| 1. I like the area/neighbourhood I live in | | | | | |
| 2. I feel able to ask for help from my neighbours if I need it | | | | | |
| 3. I feel safe in my neighbourhood | | | | | |

Any further comments:

⁴ Qn 4 from National Social Housing Survey

2.4 Satisfaction with Support Provider

Introduction specific to each Project – as you know, as part of your participation in this project you receive support from XXXXX.

a) How important is it to you to have support from XXXX?

| | |
|--------------------|--|
| Very important (1) | |
| Important (2) | |
| Not important (3) | |

b) In relation to the support provided by XXXX, how satisfied or dissatisfied are you with the following:

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Somewhat dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|---|--------------------|---------------|--|---------------------------|-----------------------|--------------------------------------|
| i) The support that has been agreed to in your case plan or support agreement | | | | | | |
| ii) The type of support you receive from your support provider? | | | | | | |
| iii) How often you have contact with your support worker/case manager | | | | | | |
| iv) The availability of your support worker? | | | | | | |
| v) Are you satisfied with the way the support provider handles private information about you? | | | | | | |

b) If you were not satisfied with any of the above, would you know how to make a complaint?
Yes/no

c) What do you like most about your support arrangement?

d) What do you like least about your support arrangement?

2.5 Support received

a) How often do you have contact with your support worker/case manager?

| | |
|---------------------------|--|
| Every day | |
| At least once a week | |
| At least once a fortnight | |
| At least once a month | |

b) What kinds of activities does XXX help you with, either in your home or outside?

[Interviewer – tick following list as they answer, or use to prompt]

| | No | Yes |
|---|----|-----|
| I. Personal hygiene (showering etc) <i>(note to interviewer: this is relevant to older people or people with disability)</i> | | |
| II. Shopping | | |
| III. Exercise | | |
| IV. Taking medication | | |
| V. Cooking | | |
| VI. Cleaning | | |
| VII. Laundry | | |
| VIII. Transport (e.g. to appointments) | | |
| IX. Banking | | |
| X. Budgeting | | |
| XI. Use of community services e.g. library | | |
| XII. Accessing government services e.g. Centrelink | | |
| XIII. Making appointments | | |
| XIV. Social activities | | |
| XV. Accessing training or education | | |
| XVI. Accessing work (paid or unpaid) | | |
| XVII. Companionship | | |
| XVIII. Other – please specify: | | |

c) Overall, do you feel you are getting enough support to help you maintain your tenancy successfully?

Yes/no

d) If no, what else do you think you need in order to maintain a successful tenancy?

2.6 Accessing various services

a) Do you feel comfortable accessing services that you need e.g. health care, job placement, using public transport, etc (interviewer – list below can be used as a prompt)

| | |
|----------------------|--|
| Always (1) | |
| Most of the time (2) | |
| Sometimes (3) | |
| Mostly not (4) | |
| Never (5) | |

b) What services do you feel you need assistance with to access?

[interviewer – use following list as a prompt]

1. Shopping facilities
2. Eating facilities (e.g. restaurant, takeaway)
3. Library
4. Parks
5. Movies
6. Religious facilities
7. Recreational facilities e.g. sports
8. Social activities
9. Health services
10. Educational/ training facilities
11. Work placement services
12. Public transport
13. Other – please specify

Any further comments:

2.7 Overall perceptions of independence

Interviewer to ask their rating on each of the following statements

| | Strongly Agree (1) | Agree (2) | Neither Agree nor Disagree (3) | Disagree (4) | Strongly Disagree (5) |
|--|---------------------------|------------------|---------------------------------------|---------------------|------------------------------|
| I feel more independent than I did before I came to live here | | | | | |
| 1. I feel able to do more things without support than I did before I came to live here | | | | | |
| 2. I feel able to continue to maintain my tenancy without support | | | | | |

Please provide any details of support you would need after your support agreement ends – [give date].

2.8 Questions specific to ex-offenders (for post-release Projects)

| | Very useful (1) | Useful (2) | A little useful (3) | Not useful at all (4) | Don't know/ unsure (9) |
|--|-----------------|------------|---------------------|-----------------------|------------------------|
| a) How useful was your pre-release program and planning? | | | | | |
| | | | | | |

b) What was most useful?

c) What was least useful?

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Somewhat dissatisfied (4) | Very dissatisfied (5) |
|---|--------------------|---------------|--|---------------------------|-----------------------|
| d) How satisfied are you with the contact time you had with your Throughcare Support Officer? | | | | | |

Please provide any further comments:

e) Did you spend any time in temporary accommodation before being provided with your current accommodation?

Yes/no

If yes, where?

Can you tell me how you felt about this?

| | Very confident (1) | Confident (2) | Neutral (3) | Not confident (4) | Much less confident (5) |
|---|---------------------------|----------------------|--------------------|--------------------------|--------------------------------|
| f) Since the last time you were released, do you feel more confident about staying out this time? | | | | | |

Please describe what has been different since last time that has contributed to you feeling more or less confident about staying out.

NOTE:

For projects that work with court diversionary programs, or exit from D&A rehabilitation, adapt questions in 2.8 for this target group.

Annex 3a

Housing and Human Services Accord

Shared Access/Partnership Project

Questionnaire for Partner Agencies – Housing Providers (DOH and CHPs)

This will be filled in online and should take about 5 minutes.

1 Referral/nomination and assessment

| | Excellent (1) | Good (2) | Average (3) | Weak (4) | Poor (5) | Don't know/ or not applicable to me |
|---|---------------|----------|-------------|----------|----------|-------------------------------------|
| a) Overall, how would you rate the effectiveness of the nomination process? | | | | | | |
| b) Overall, how would you rate the effectiveness of the assessment process? | | | | | | |

2 Client information sharing

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|---|--------------------|---------------|--|------------------|-----------------------|--------------------------------------|
| a) Overall, how satisfied are you with access to information about clients from other agencies involved in the partnership? | | | | | | |

3 Satisfaction with Support Provider

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|--|--------------------|---------------|--|------------------|-----------------------|--------------------------------------|
| a) Overall, how satisfied are you with support provided to your clients? | | | | | | |
| b) Overall, how satisfied are you with the way the support provider has dealt with your clients? | | | | | | |

| | Excellent (1) | Good (2) | Average (3) | Weak (4) | Poor (5) | Don't know/ not applicable to me |
|--|---------------|----------|-------------|----------|----------|----------------------------------|
| c) How would you describe your relationship with the Support Provider? | | | | | | |

4 Management and coordination

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable (9) |
|--|--------------------|---------------|--|------------------|-----------------------|--------------------------------|
| a) Overall, how satisfied are you with communication between the partner agencies? | | | | | | |
| b) Overall, how satisfied are you with the coordination and management of the Project? | | | | | | |

| | Always (1) | Most of the time (2) | Sometimes (3) | Not enough (4) | Not at all (5) | Don't know/ not applicable (9) |
|---|------------|----------------------|---------------|----------------|----------------|--------------------------------|
| c) Overall, do you feel that partner agencies have shared responsibilities appropriately? | | | | | | |

5 Client outcomes

a) At this stage of the project, overall how would you rate the effectiveness of the project in the following:

| | Highly effective (1) | Effective (2) | Neither effective nor ineffective (3) | A little effective (4) | Not effective (5) | Don't know/ not applicable (9) |
|--|----------------------|---------------|---------------------------------------|------------------------|-------------------|--------------------------------|
| a) Assisting your clients to improve their wellbeing | | | | | | |
| b) Assisting your clients to sustain a tenancy? | | | | | | |
| c) Assisting your clients to establish independent living? | | | | | | |

6 Skill development

At this stage of the Project, can you identify any new skills or knowledge you have gained?

Are there any skill or knowledge areas you would like to gain to better engage in this kind of partnership project?

If so, please provide details

Annex 3b

Housing and Human Services Accord

Shared Access/Partnership Project

Questionnaire for Partner Agencies – Support Providers (including referring agencies, service delivery agencies, brokerage agencies etc)

This will be filled in online and should take about 5 minutes.

1 Referral/nomination and assessment

| | Excellent (1) | Good (2) | Average (3) | Weak (4) | Poor (5) | Don't know/ or not applicable to me |
|---|---------------|----------|-------------|----------|----------|-------------------------------------|
| a) Overall, how would you rate the effectiveness of the nomination process? | | | | | | |
| b) Overall, how would you rate the effectiveness of the assessment process? | | | | | | |

2 Client information sharing

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|---|--------------------|---------------|--|------------------|-----------------------|--------------------------------------|
| a) Overall, how satisfied are you with access to information about clients from other agencies involved in the partnership? | | | | | | |

3 Satisfaction with Accommodation and Housing Provider

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|---|--------------------|---------------|--|------------------|-----------------------|--------------------------------------|
| a) Overall, how satisfied are you with the accommodation provided to your clients? | | | | | | |
| b) Overall, how satisfied are you with the way the DOH has dealt with your clients? | | | | | | |

| | Excellent (1) | Good (2) | Average (3) | Weak (4) | Poor (5) | Don't know/ not applicable to me |
|---|---------------|----------|-------------|----------|----------|----------------------------------|
| c) How would you describe your relationship with DOH? | | | | | | |

4 Management and coordination

| | Very satisfied (1) | Satisfied (2) | Neither satisfied nor dissatisfied (3) | Dissatisfied (4) | Very dissatisfied (5) | Don't know/ not applicable to me (9) |
|--|--------------------|---------------|--|------------------|-----------------------|--------------------------------------|
| a) Overall, how satisfied are you with communication between the partner agencies | | | | | | |
| b) Overall, how satisfied are you with the coordination and management of the Project? | | | | | | |

| | Always (1) | Most of the time (2) | Sometimes (3) | Not enough (4) | Not at all (5) | Don't know/ not applicable (9) |
|---|------------|----------------------|---------------|----------------|----------------|--------------------------------|
| c) Overall, do you feel that partner agencies have shared responsibilities appropriately? | | | | | | |

5 Client outcomes

a) At this stage of the project, overall how would you rate the effectiveness of the project in the following:

| | Highly effective (1) | Effective (2) | Neither effective nor ineffective (3) | A little effective (4) | Not effective (5) | Don't know/ not applicable (9) |
|--|----------------------|---------------|---------------------------------------|------------------------|-------------------|--------------------------------|
| a) Assisting your clients to improve their wellbeing | | | | | | |
| b) Assisting your clients to sustain a tenancy? | | | | | | |
| c) Assisting your clients to establish independent living? | | | | | | |

6 Skill development

At this stage of the Project, can you identify any new skills or knowledge you have gained?

Are there any skill or knowledge areas you would like to gain to better engage in this kind of partnership project?

If so, please provide details

Annex 4

Housing and Human Services Accord

Shared Access/Partnership Project

Interview schedule for partner agencies

Key staff to be interviewed from agencies: case managers, client service staff, managers, regional managers

Please note that the information gained from these interviews will not be attributed to any individual or agency but will be collated and presented as an overview of key findings.

Date of interview: _____

Name: _____

Position: _____

Agency: _____

How long have you been working with this agency? _____

How long have you been involved in this Project? _____

Partnership

1. How is your relationship with the other Agencies in the partnership?
2. Has your relationship changed since this Project started? If so, in what ways?
3. Has your level of knowledge or understanding of the other Agency's operations changed? In what way?
4. How do you find the monthly Project Working Group meetings?
5. Do you feel the roles between agencies are clear? If not, provide details.
6. Do you feel all the partners have undertaken their roles and responsibilities appropriately? If not, provide details.
7. What aspects of this Project do you think have been the most successful?
8. If you were to be involved in more Projects of this nature, what recommendations would you make to improve the way the partnership is managed?

Operation/management of support

1. What processes do you go through in planning and providing support to clients in this Project? Have there been any issues for you in this process?
2. Do you have any comments about the administration of the Project e.g. its scope, resources, assessment processes and support from DOH/CHP, layers of processes/documentation?

3. Have you been involved in the development of any procedures, protocols or tools for this Project? If so, please describe what they are and how they have been developed.
4. Have any of these procedures, protocols or tools been shared with other staff in your Agency or other areas/divisions of your Agency?
5. Has this Project changed the way you deliver services? How?
6. What types of internal policies and procedures do you have in relation to this Project that you have found to be **beneficial**?
7. What types of internal policies and procedures do you have in relation to this Project that you have found to be **less successful**?
8. Do you feel that you (or other staff in your Agency) **have gained any new skills or knowledge** from this Project? If so, what are they?
9. Do you feel that you (or other staff in Agency) **need training in any new skills or knowledge** in order to work more effectively in this type of project?
10. Have there been any workforce issues in relation to this Project e.g. excess workload, OHS, staff retention, staff supervision etc?

Expanding or replicating the model

1. Does this Project meet your Agency's corporate objectives? If yes, details
2. As a result of this Project are there any implications or lessons learned for broader system, policy or procedural changes within your Agency? If so, details.
3. To what extent do you think this model can be implemented more widely across your Agency? What constraints are there?
4. In what way have you disseminated learning from the Project?
5. Do you have any ideas for further disseminating learning from the Project within your agency?

Outcomes for clients

1. What are the benefits of this Project for your clients? Any examples?
2. What downsides are there for your clients? (e.g. loneliness) Any examples?
3. To what extent do you feel your clients are able to live independently as a result of this Project?
4. What complaint mechanisms are available to clients? How do you think they would express their satisfaction or dissatisfaction with the Project/service? Have you received any complaints? Examples?

5. Do you think this Project fully addresses clients' support and housing needs? If not, what are the gaps?
6. In what ways has the Project responded to **changing needs** of clients?
7. How do you see the future for your clients at the end of this Project and/or their support agreement?
8. How do you see the future of this kind of 'shared access' arrangement?
9. Are there any issues in this kind of project that you think need to be considered in future projects to improve outcomes for clients? Any ideas for improvement?

Annex 5

Housing and Human Services Accord

Shared Access/Partnership Project

Interview schedule for stakeholder agencies external to the Partnership but with key involvement in relation to clients

Date of interview: _____

Name: _____

Position: _____

Agency: _____

How long have you been working with this agency? _____

1. What is your understanding of the objectives of the Project?
2. What interaction have you had with the Agencies involved in the partnership?
Comment on any negative or positive aspects.
3. What services have you provided to the clients of the Project?
4. Do you feel the Project and agencies involved have helped you to deal with the clients better? In what way?
5. What benefits do you think the Project has provided to the clients?
6. Are you aware of any difficulties experienced by clients during the Project?
7. Do you have any suggestions for improving service delivery to the clients, either by your agency, or other agencies?

Annex 6

Shared Access/Partnership Project

Report format

The following outlines the proposed broad content of project reporting for the mid-term review report and final evaluation report for the Trial Shared Access Schedule. A more detailed outline will be discussed with the SOG separately.

1. Executive Summary

2. Introduction

- a. overview of Trial Shared Access Schedule and its intent, aims, objectives

3. Individual project reports

- a. A section for each project that describes the scope of the project, key activities and working mechanisms and results for partnership effectiveness and client outcomes

4. Discussion and analysis of project results

- a. *Client outcomes* – overview of client outcomes in regard to tenancy sustainability and wellbeing. Analysis of success factors or barriers to good outcomes.
- b. *Partnership effectiveness* – discussion of findings in relation to agency systems, operations and partnerships – what worked, what didn't, what are the lessons for expansion or replication of the model into 'business as usual'

5. Conclusions and Recommendations

Annexes – data tables

Annex 7 – Shared Access Trials

The following projects have been approved as Shared Access Trials under the Trial Shared Access Schedule.

1. Young People Leaving Care (Maitland)
2. Young People with a Disability Leaving Care
3. Independent Living Program – People with an intellectual disability
4. Dillwynia Correctional Centre
5. Ex-Prisoners with Co-Existing Disorders – Newtown
6. Ex-Prisoners with Co-Existing Disorders – Nowra
7. Ex-Prisoners with Co-Existing Disorders/Dual Diagnosis – Liverpool/Fairfield
8. Ex-Prisoners with Co-Existing Disorders – Gosford
9. Parole Support Initiative
10. Tamworth Vulnerable Youth
11. Moree Case Coordination
12. Disability-HASI (DHASI)
13. Homereach Initiative
14. Housing First
15. Juneperina
16. Riverwood Case Coordination

Annex 8: Consent to Participate in Evaluation

You have been offered a service by DOH that involves you getting help with your tenancy and other needs through the [name] Project. This is a new project that is helping us to improve the way tenants are supported. For more information about this project, please see the project information sheet.

We want to know if this project has helped you. To do this we need to get your approval (or consent) saying that you're happy to give us feedback about the project.

If you provide us with feedback, it will help us to provide better housing and support for other people. However, you don't have to be involved, and you can withdraw your consent at any time.

Details of involvement

How will you be involved?

There are two ways in which we would like to ask for your feedback:

1. Your case manager may provide information from your case file that may be used to understand how the project has helped you to meet your needs. The information may include the assessment of your needs, your goals (what you want to achieve) and your progress. This information will not identify your personal details.
2. You will be interviewed by a person who is independent from the service agencies, to find out your experience in the project and whether you feel you have benefited from the services provided. This information may be linked to the information from your file.

Any information that you provide is confidential and you will not be identified in any reports. Any information you provide will only be used to improve services.

How much time will be involved?

We expect to conduct 1 or 2 interviews during a 12 month period of about 1-2 hours each. You are welcome to invite a friend or someone you trust to sit in on the interviews.

Can I withdraw consent if I change my mind?

If at any time you decide not to participate in the evaluation, you can do so by telling or writing to [name of case manager or key person in contact with client]. During an interview, you have the right to end the interview at any time. This will not affect the housing and support services you receive.

Do I have to answer all the questions in the interview?

No, you can decide not to answer some questions if you wish.

Where can I get more information?

If you would like more information about this evaluation, please contact:
XXX

Consent Form – (Refer to Information on previous page)

Project: *[name of project]*

I understand that:

- By signing this form I am consenting (agreeing) to the release of information about me from my case file to be used in the evaluation.
- I am consenting (agreeing) to be contacted for an interview by the person conducting the evaluation.
- My personal details will not be identified in any report.
- If I don't sign this form, I will still continue to receive the housing and support services provided by this project.
- I can change my mind and withdraw consent at any time – in writing or verbally to my case manager.
- All information provided will be confidential other than information related to child protection issues or law and safety matters, which may be given to agencies without my consent.

All aspects of this form have been explained to me and I understand them.

Signed by person

Name: -----Signature: ----- Date ---/---/-----

Consent was given verbally to: (if applicable)

Name of person/officer:

Organisation: Position:

Signature of Person/Officer Date: ---/---/-----

In the presence of (signature of witness)

| Office Use | |
|---|--------|
| 1. Was an interpreter required? | YES/NO |
| If yes, please request the authorised Interpreter to sign: | |
| I, authorised Interpreter with (insert agency) was present and interpreted for consent with the client named in this form | |
| (signature) | |
| (date) | |
| 2. Did the person signing this form give informed consent? | YES/NO |
| 3. The full purpose and reasons for giving consent have been discussed with the client | YES/NO |
| 4. Officer taking receipt of this consent: | |
| Name of Person/Officer:..... | |
| Organisation ¹ :..... Position:..... | |
| Signature of Person/Officer:..... Date: ____/____/____ | |

¹ Please note that the form can be used by a worker from either a Government agency or non-Government agency, depending on which person is the primary worker dealing with the client.