

- **Identification of any issues and lessons learned**

It is just as valuable if not at times (more valuable) to have an effective paid Administrator available to those experiencing an emergency energy crisis, as it is to have considerable grant funding available. An advocate can put the client in touch with multiple resources, helping them to reach financial sustainability, as well as be able to negotiate the client's arrears in an effective manner, halting a disconnection or assisting in having the client's services restored via a payment arrangement or grant/loan.

Our experience and statistics tell us that an Administrator who is given the time and resources to advocate and negotiate rather than only giving grants and loans can help many more people by giving them an opportunity to help themselves and work toward long term sustainability. Advocacy, negotiations, payment arrangement along with a small grant or loan can be even more effective...however without the ability to have full-time well-trained staff to administer such programs, it is inevitable that programs are not able to be as effective.

Emergency financial assistance should also be available to those who are experiencing unexpected and temporary financial hardship as well as to the low-income earners, to prevent the incidence of homelessness

Clients may prefer a loan vs. a grant.

Loans do help to ensure funding is re-circulated to other families in need.

Grants are usually more preferable when a social agency is certain that a loan payment would cause further financial hardship to a family or individual.

Sitting with a client and working with them on a budget review is very helpful in ensuring that clients have a realistic grasp on their budget as well as billing expectations from the utility company.

It is to be expected that clients on OW and ODSP and any other income support programs might need to access the program more than once in a year... perhaps for a payment arrangement, perhaps for a loan/grant

There needs to be room for exceptional situations and it would be extremely helpful if social service agencies could use their own discretion in difficult circumstances

- **Suggestion on characteristics of a province wide Financial Assistance framework**

There needs to be consistency in program delivery for both the social service agency as well as the utility provider, taking into account that social agency resources vary as much as utility distributors

Adequate time must be given to social agencies to complete the intake process as well as provide payment of the client's account, recognizing that it may take some time before the client can even attend the appointment due to lack of transportation.

It would be preferred, when possible, that social service agencies would have one regular utility distributor contact per utility company vs a large pool of contacts per utility company, when negotiating a client's account, as it ensures that negotiations are time efficient and effective for both the utility provider and the social agency. This reduces time spent reiterating who the social agency administrator is, the client's circumstances, and many other pertinent utility account details. A rapport is also developed between social service agency and utility distributor.

Referrals from utility distributors, to clients experiencing a financial crisis who need support would be ideal, just as it would be for all social agencies to provide a number of community referrals so that clients can access as many resources as they require.

- **Assistance our organization can provide in delivering a province wide program.**

Report on Best Practices

Act as a delivery agent of the LEAP program

Any further expertise the O.E.B may require for successful implementation of the L.E.A.P. program

The Emergency Home Energy & Support Program Initial Assessment

Board Report Month _____ Quarter Report # _____ Loans/Grant Date: _____ Amount: _____

Donations: In office: Date: _____ Amount _____ Out of Office: Date: _____ Amount: _____

Date: _____

Client ID# _____

Last time accessed: _____

Service Accessed: _____

Name: _____

Date of Birth: _____

Spouse: _____

Date of Birth: _____

Family Structure: _____

Number of Children: _____

Ages and Gender of Children _____

Address: _____

Subsidized Housing: Yes No

Phone: _____

Emergency Contact: _____

Phone: _____

Referred by: _____

Workplace: _____

I am requesting assistance with:

Utility Arrears Utility: _____ Amount: \$ _____

Utility (2): _____ Amount: \$ _____

Is any portion of this bill a security deposit? _____ If yes, Amount: \$ _____

Disconnection Notice: Yes No Date: _____

Disconnection Notice (2): Yes No Date: _____

When was the last time you made a payment to utility? Date: _____ Amount: _____

When was the last time you made a payment to utility (2) Date: _____ Amount: _____

When is the last time you spoke to the utility provider and what was the outcome?

When is the last time you spoke to the utility provider (2) and what was the outcome?

Rent Arrears Amount: \$ _____

Eviction Notice: Yes No **Date:** _____

Landlord Name: _____ **Phone Number:** _____

Have you spoke to the landlord regarding this matter, and if so, when and what was the outcome?

Other _____

OW or ODSP Recipient Yes No **Caseworker:** _____

Last time CSUB was accessed: _____ **Amount:** \$ _____ **Balance:** \$ _____

I have filed for my Income Tax Return: Yes No **Amount of Return:** \$ _____

General Information:

I have provided A Place Called Home with copies of the following documents:

- | | |
|--|--|
| <input type="checkbox"/> Bank Account Balance | <input type="checkbox"/> Income verification |
| <input type="checkbox"/> 3 Months of Bank Statements | <input type="checkbox"/> Utility Bills <input type="checkbox"/> Hydro <input type="checkbox"/> Water <input type="checkbox"/> Enbridge |
| <input type="checkbox"/> Rent Receipt/Mortgage Statement | <input type="checkbox"/> Disconnection Notice/Eviction Notices |

MONTHLY BUDGET REVIEW

Income

ODSP: _____
Ontario Works: _____
Employment: _____
Child Tax Credit: _____
Universal T.B. _____
Support Payments: _____
Other: _____

Total Monthly Income: _____

Expenses:

Rent/Mortgage: _____
Hydro: _____
Gas: _____
Oil: _____
Water: _____
Phone: _____
Hot Water Tank: _____
Cable/Satellite: _____
House Insurance: _____
Car Insurance: _____
Property Taxes: _____
Childcare costs: _____
Food: _____
Travel: _____
Loan: _____
Credit: _____
Credit: _____
Credit: _____

Arrears

Rent/Mortgage _____
Hydro: _____
Gas: _____
Oil: _____
Water: _____
Phone: _____
Hot Water Tank: _____
Cable/Satellite: _____
House Insurance: _____
Car Insurance: _____
Property Taxes: _____
Childcare Costs: _____
Food: _____
Travel: _____
Loan: _____
Credit: _____
Credit: _____
Credit: _____

Total Expenses: _____

(Deficit): Surplus _____

