Standard for Public Good Accounting and Reporting in Street Outreach Services in Homelessness

Rule # ED-002

This Public Good Measurement and Reporting Standard is issued by the Public Regional Outcomes Standards Board.

Written comments should be addressed to

Research and Technical Director
Serial Reference No. 2022-ED-002

Issued: 27 October 2022
Comment Deadline: 10 November 2022
Notice to Recipients of This Exposure Draft of a Proposed Measurement Standard.

The Board invites comments on all matters in this Exposure Draft until 10 November 2022. Interested parties may submit comments in one of three ways:

• Using the electronic feedback form available on the PROS Board website at Exposure Documents Open for Comment
• Emailing comments to sdprosboard@sdcta.org, Serial Reference No. 2022-ED-002
• Sending a letter to “Research and Technical Director, Serial Reference No. 2022-ED-002, San Diego Public Regional Outcomes Standards Board, San Diego Taxpayers Educational Foundation, 2508 Historic Decatur Road, San Diego, CA 92106.”

All comments received are part of the PROS Board’s public file and are available at www.sdcta.org/sdprosboard.

If you require an extension to the two-week public comment period, please make a formal request by Thursday, November 3rd through the channels outlined in the exposure drafts. If the PROS Board receives a high volume of extension requests, it may opt to extend the public comment period.
Purpose of Exposure Draft

The purpose of this Exposure Draft is to disclose the scope, area, and function of a regional standard on the reporting of long-term outcomes of clients who have exited programs intended to end an individual’s homelessness condition.

This draft is dually intended to inform the public, members of the Public Regional Outcomes Standards Board (PROS Board), PROS Board Working Group participants, and all other regional stakeholders in the achievement and reporting of successful outcomes in public services on the due processes of the PROS Board and its working groups which culminated in this proposed standard and document. The purpose and intention of the PROS Board itself is to facilitate a collaborative and consensus-based approach to determining regional standards on the reporting of outcomes and data in public services.

This document and the proposed standards contained herein are the results of this collaborative and consensus-based approach, with community-wide participation, including those members of privately and publicly funded organizations which took part in our working group discussions on homelessness, or those members of the public and/or stakeholders who communicated their thoughts and experience.

This proposed standard on reporting long-term outcomes seeks to increase consistency at the program and service levels within the homelessness system of care so that funders can make appropriate comparisons on performance. To be clear, this proposed standard does NOT establish benchmarks of performance; funders or other evaluative entities, like the San Diego County Taxpayers Association, should elect to create those benchmarks as reporting is made consistent across the region.

This document covers all necessary related aspects of this proposed standard, including purposes, scope and expectations on long-term outcome reporting of individuals experiencing homelessness who have been serviced within the San Diego region’s system of care.
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Objective

The PROS Board issues these regional standards on homeless street outreach to increase the likelihood an individual experiencing homelessness will end their homelessness permanently and as efficiently as can be reasonably expected in our region. Additionally, these standards are issued to facilitate clarity in the reporting of successful outreach, allowing for more coherent economization of valuable community resources for homelessness service providers, funders, and municipal leaders.

Intended Regional Effects of Issuing This Standard

When organizations that engage in street outreach provide the consistent reporting required within this regional standard, the balanced set of metrics will permit investors to judge their effectiveness and efficiency in street outreach and be able to separate those external factors that may have led to continued homelessness for those who have been engaged by an outreach worker. An investor should be able to make a reasonable judgment as to what constitutes performance from their lens for an organization conducting outreach programs for whom they are considering funding.

Similarly, organizations conducting outreach programs should be able to utilize this balanced set of metrics to make strategic and operational decisions on their outreach efforts. Specifically, these balanced metrics will help organizations conducting outreach programs to identify areas of strong performance for potential increased focus to build on what works. These metrics will help organizations conducting outreach programs identify areas of weak performance to decide, if in the event the area of weak performance is internal, whether operational improvement is necessary, or if in the event the area of weak performance is external (e.g., market conditions like shelter availability), whether outreach is aligned with the organization’s strategy.

Other Regional Purposes Outside the Focus of This Standard

The PROS Board acknowledges that it is more likely than not that resources in the system of homelessness services in San Diego County are not optimized to the needs of the individuals experiencing homelessness. That is, it is possible that due to the limit in aggregate resources, investors could be putting more funds into areas of service like outreach than other areas of service like mental health, for example, and that such tradeoffs could result in both efficiencies and inefficiencies in the system. It is also possible that investors may be limiting organizations to work only within certain geographies (e.g., a public body disallowing acceptance of an outreach referral from outside its jurisdictional borders). While this standard will help organizations conducting outreach programs enhance trust with their outreach-focused investors, this standard alone will not create the needed transparency within and around the entire system of homelessness services, including services outside of outreach, and as such cannot be used to make multivariate resourcing or investment decisions involving other areas of service. Other regional standards in diversion or real-time housing demand or supply will tackle these issues.

Finally, this standard acknowledges the San Diego Continuum of Care’s (SD COC) outreach operational requirements for organizations, and this PROS Board standard creates consistency and uniformity in
reporting for organizations following those operational requirements. This standard neither augments nor replaces the SD COC operational requirements; it merely creates rules on how organizations report on street outreach when they are or are not in compliance with those operational requirements.

Standards of Public Good Accounting and Reporting

Scope and Scope Exceptions

These standards apply to any organization conducting homelessness street outreach in San Diego County, specifically focused on the intentional building of trusted relationships with individuals experiencing homelessness in an iterative process of engagement ultimately leading to the referral of services and housing that lead to a permanent end of each individual’s homelessness. Essentially organizations conducting street outreach with the expressed intent to match individuals to services and housing are in scope.

Organizations excluded from these standards are those who engage with individuals experiencing homelessness but do not intend to build trusted relationships with the individuals experiencing homelessness in the eventual aims of services provision and ending their homelessness condition permanently. For instance, an organization solely dedicated to research on those experiencing homelessness does not fall within the scope of this standard; while certainly that organization may have the opportunity to build trust, that is not their intent nor relevant in this standard. Furthermore, a law enforcement organization may be outside the scope of this standard if its main purpose in their engagement with individuals experiencing homelessness is for enforcement of local rules and not trust building or subsequent referral to services or housing. Finally, a street medicine outreach team without any service coordination component is not in scope.

Key Terms

“Previously Unknown Unsheltered” – from the COC Outreach Requirements as the population not previously connected to outreach with whom an organization conducting outreach services should spend less than 50%, and ideally no more than 25%, of time. These individuals are identifiable using self-reported prior living situation data elements in HMIS.

“Already Known Existing Unsheltered” – from the COC Outreach Requirements as the unsheltered population previously encountered with whom an organization conducting outreach services should be re-engaging and serving more than 50% and ideally 75% of time. These individuals are identifiable using self-reported prior living situation data elements in HMIS.
Recognition – Initial and Subsequent Measurement

On Individuals Not Consenting to Case Management or Services

Accepting that street outreach is an iterative process intended to build sufficient trust with an individual experiencing homelessness to consent to services, an organization’s recognition of pre-consent activities permits reporting on aggregate trust being built.

An organization conducting outreach programs shall recognize as successful a completed outreach encounter with an individual experiencing homelessness, but not yet consenting to case management or services, when the organization records for that encounter additional personally identifiable information or additional identification of needs of the individual that are reasonably accurate to allow for de-duplication, the location of the encounter, the number of days since the last outreach encounter, and any service offerings made that are not referrals to case managers or services.

Conversely, an outreach encounter, even if required to be recorded in some system, shall not be recognized as successful if the encounter is sufficiently short or non-substantive that the outreach worker was unable to garner additional personally identifiable information or additional assessment of needs. In other words, if the encounter does not do anything to build trust with that individual, it shall not be recognized as a successful encounter.

On Individuals Consenting to Case Management or Services

Accepting that in aggregate there is an overall shortage in the San Diego region and its sub-geographies of “supply” of services and housing to meet consented to “demand” by individuals experiencing homelessness, an organization’s reporting of coordination, both successful and unsuccessful, permits the study of efficient and inefficient “flow” across the system of care in the region.

An organization conducting outreach programs shall recognize outreach encounters with persons experiencing homelessness and consenting to case management or services based on the following factors:

1. recording for that encounter of the location and final referral for case management or services, and
2. when the individual experiencing homelessness consents to housing, input from the encounter of additional information into the Coordinated Entry System that results in a change to factors that affect an individual’s Composite Score.
3. If data on all of the factors which affect an individual’s composite score have been completely entered into the Coordinated Entry System, and those factors remain unchanged, then all interactions with a client shall be recognized as outreach encounters.

For services, if there is no result in any of the referrals to match the individual to case management or services to which the person consents, i.e., when there is no availability of either case management or services, the organization records for that encounter the list of organizations to whom referrals were
attempted in sharable case notes and where the individual can reasonably access the service opportunity in the judgment of the service provider.

Conversely, an outreach encounter shall not be recognized as successful if the outreach did not refer the individual to a case manager or services while simultaneously not recording to what case management or services organizations referral attempts were made. That is, the organization conducting outreach services must record its good faith effort to refer a person experiencing homelessness to services to which they consent. In the case of housing, additional input into the Coordinated Entry System results in an update to an individual’s “Composite Score.” Therefore, if an encounter is made, there ought to be a good faith effort to collect information which impacts the person’s composite score. Otherwise, the encounter is not successful because the likelihood of reaching better outcomes for the individual has not materially changed.

Of note, outreach workers – in the recording of the lack of availability – should use information they have obtained through their organization, previous outreach encounters, or any centralized information hubs that would be reasonable to consider as unchanged in the duration of an outreach encounter. In practical terms and for example, this means that if an outreach worker with an encounter earlier in the day learned that a services organization has no more space available, then they should record that lack of availability on the next encounter without feeling obligated to reconfirm the lack of availability.

**Presentation on Performance or Financial Reports**

**On and In the Notes of Statements of Financial Position**

Organizations conducting outreach programs shall report conspicuously in the notes of any statements of position the following measurements for that date of the financial position:

1. The number of individuals experiencing homelessness who are **Previously Unknown Unsheltered** with whom they have contact;
2. For that population, the minimum, the mean, the median, and the maximum number of days between recognized outreach encounters as based on the record change recording functions within HMIS, if feasible;
3. The number of individuals experiencing homelessness who are **Already Known Existing Unsheltered** with whom they have contact; and
4. For that population, the minimum, the mean, the median, and the maximum number of days between recognized outreach encounters as based on the record change recording functions within HMIS, if feasible.

If for items 2 and 4 above the organization considers this not feasible to report, then the organization shall disclose why it assesses that.
If the organization has grants or pledges receivables for outreach services specifically, those amounts should be accounted for separately from the grants or pledges receivables either explicitly on the statement of financial position or conspicuously in the notes related to grants or pledges receivables.

In the Notes of Statements of Activity
Organizations conducting outreach programs shall report conspicuously in the notes of any statements of activity the following measurements for the period of the activity:

1. For encounters with individuals in the time period considered Previously Unknown Unsheltered and Already Known Existing Unsheltered, the proportions of the encounters where individuals consented to a service – with space availability – and then could reasonably access such service;
2. For encounters with individuals in the time period considered Previously Unknown Unsheltered and Already Known Existing Unsheltered, the proportions of the encounters where individuals who consented to housing and then the Composite Score changed;
3. For encounters with individuals in the time period considered Previously Unknown Unsheltered and Already Known Existing Unsheltered and for encounters when individuals consented to services that were reasonably accessible but without space availability, whether there were more referrals than availability daily.

If conducting street outreach in a sufficiently large geographic area that impacts availability of services, the organization may elect to provide the above information additionally into geographic subdivisions. Such geographic subdivisions, if used, should be identifiable in public records, like zip codes, school catchment zones, a city’s subdivisions, etc.. It should not be a geographic subdivision that is proprietary.

If the organization has revenue or expenses for outreach services separate from other services provided, those amounts should be accounted for separately from revenue and expenses either explicitly on the statement of activity or conspicuously in the notes related to revenues and expenditures.

In Any Performance Reporting
If an organization conducting outreach programs publishes publicly available performance reports, like in an annual report, separate from financial statements, then the organization shall present the information in the previous two subsections.

Disclosure Requirements
When reporting pursuant to this standard, the organization must disclose the methods by which it determined such measurements, and when independently audited or reviewed, the auditor or reviewer should make an evaluative statement whether those methods meet the intent of this standard.

Of note and on client data specifically, compliance with any future PROS Board rules on data quality may be sufficient disclosure in the future. But for data on lack of space availability during attempted referrals, for instance, the organization shall disclose the methods it uses to track these data. When reporting lack of space availability, the organization shall disclose within a relevant time period the organizations which
their outreach workers learned lacked space availability and the methods used by the organization, either through internal controls or through central information hubs, to disseminate to outreach workers current space availability, capacity of case management and services.

Of note, this standard does not specify exactly where within reports or which notes on financial statements an organization must provide the information or disclosures required in this standard. See Appendix B for example applications of this standard.

Effective Date and Transition

This standard shall be effective 1 January 2023.

Organizations whose fiscal years end between 1 January 2023 and 31 March 2023 may wait for their subsequent fiscal year to begin to effect this standard. For any reports issued between 1 January 2023 and the beginning of an organization’s fiscal year, the organization should minimally disclose its intention to transition to this standard in its following fiscal year.

Appendix A:

Background Information

San Diego Continuum of Care Outreach Operational Requirements

As already noted, the San Diego Continuum of Care has issued operational requirements on street outreach. The document is publicly available at the website of the San Diego Regional Task Force on Homelessness, as the region’s Continuum of Care executive agent, and the PROS Board offers this summary for additional context for the reader of this standard.

Summary SD CoC Street Outreach Standards v.1/20/21

1. Applicability of the Standards and the Role of Funders: This applies to non-profit street outreach or publicly funded social service staff (not law enforcement) conducting street outreach in SD CoC with City of SD, COSD, SDHC, or RTFH funding. Providers shall adhere to funders/contractual obligations and funders shall monitor & provide oversight. RTFH, COSD, City of SD, SDHC share a commitment to these standards.

2. Taking Direction in the Coordination and Delivery of Street Outreach Services

RTFH is responsible for providing a system coordinator for all outreach activities across CoC and shall do so in coordination with COSD for regional coordination in N, E, and S parts of the CoC while City of SD/SDHC is responsible for city/central SD.

RTFH is responsible for establishing policy direction and, in partnership with aforementioned, providing funding to organizations to engage in street outreach activities to fulfill that policy direction. Policy is
developed and amended through a collaborative process between major funders, regional coordination entities, and RTFH.

A regional coordinator may request that a Supervisor of a street outreach team provide services for a particular person/group of persons. For valid requests, reasonable measures should be taken to respond to those requests within 3 business days, so long as it does not interfere with the ability of the street outreach staff to spend 50% or more of their time with the known unsheltered persons that they are actively assisting towards the goal of housing. The provider shall report back the outcome or any necessary info to the regional coordinator within 1 business day of the response to the unsheltered person(s). Details of interaction or outcome may only be shared with consent of the party involved. Without consent, info is limited to whether or not the request to respond was fulfilled. A coordinator and/or monitor may be directly involved in providing/observing/monitoring street outreach.

Regional Coordinators are responsible for ensuring coverage and limiting duplication.

3. Defining Street Outreach: Often begins with an initial encounter to engage an unsheltered person to understand their situation and environment. It is “a professional homelessness services intervention that focuses primarily on supporting individuals with accessing permanent or temporary housing by building trusting relationships and ongoing rapport. Street outreach seeks to engage individuals living unsheltered in a culturally competent and trauma informed manner; provide links to mainstream services, and use diversion and problem-solving techniques to connect people with safe housing options whenever possible. The primary and ultimate goal of street outreach is to find affordable housing for each individual, with access to voluntary wraparound services needed to stay healthy, including employment, substance use treatment and mental health care. While this is ideally accomplished quickly, outreach often requires time and interactions with individuals experiencing unhoused homelessness therefore should not be seen as one-time engagements. Rather, each interaction should be seen as an opportunity for outreach staff to build a relationship and help people work toward making a connection to housing and services. Key to the success of outreach and engagement efforts is regular follow-up and building trust with individuals through regular interactions, including learning about the individuals' current social network and supports.”

4. Professional Training and Ethics

Funders of street outreach activities are responsible for coordinating, offering, making available and/or providing funding for training (by qualified trainers with subject matter expertise and practical experience) to meet these standards. Employers of outreach staff are responsible for ensuring their staff attend trainings and track training attendance. Organizations may provide in house training with funder approval.

Training on the following topics shall be completed within 6 months of starting employment as a street outreach worker, unless completed within the past 2 years and shall be refreshed once every 3 years thereafter. Cultural Competency, Motivational Interviewing (MI), Assertive Engagement, Trauma Informed Care, Harm reduction, Substance Use Disorders, Mental Health First Aid, mental health recovery, self care and vicarious trauma, effective goal setting (SMARTER goal setting), and Mandated Reporting.

Documentation training, and the use of HMIS, shall be completed within the 1st month in outreach position and shall be refreshed once every 3 years, or sooner if substantial changes to documentation standards or HMIS have been made.

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Training on street outreach staff safety shall be completed within the first month of starting outreach role and refreshed once every 3 years thereafter

First aid and CPR shall be completed within 3 months of starting outreach role, unless already currently certified and shall be refreshed as needed to maintain certification

Training on overdose response and the administration of Narcan shall be completed within 3 months of starting outreach role, unless completed within past 2 years and refreshed once every 3 years thereafter

Training on professional boundaries shall be completed within 3 months of starting outreach role, unless completed within past 2 years and refreshed once every 3 years thereafter

Training on VI-SPDAT and Coordinated Entry practices shall be completed within 3 months of starting outreach role, unless completed within the past 2 years and refreshed once every 3 years thereafter. If changes are made in CES, training will be provided on a more timely basis to ensure compliance.

Training on ethics and street outreach delivery shall be completed within 3 months of starting outreach role, and refreshed once every 3 years thereafter

Training on Policy Guidelines for Regional Response for Addressing Unsheltered Homelessness and Encampments Throughout San Diego County shall be completed by supervisors and outreach staff shall be completed within 3 months of starting outreach role, unless completed within past 2 years and refreshed once every 3 years thereafter, or sooner if there is a policy amendment

Until all required trainings are completed, new(er) staff shall be paired with an experienced outreach staff that has completed the training whenever possible.

5. Acknowledging the Risks that Come with the Work and Personal Safety: Instances that are deemed too risky or unsafe to engage in should be reported to supervisor, and when necessary, to the regional coordinator. Staff shall engage in self-care; process critical incidents, use EAP resources and other available resources. Staff and employers are responsible for promoting personal safety, taking measures to reduce risk, and training. Staff shall remove themselves from real or perceived threat and report this to a supervisor. Events should be tracked by supervisors and supervisors should inform regional coordinator as requested. Staff shall keep supervisors informed of their planned location and changes.

6. Service Orientation: Awareness of potential power imbalance between staff and clients is important. Empathy and compassion are needed. A person-centered and strength-based approach is encouraged including personalized service support plans based on individual/family needs, leveraging their strengths. Employ a trauma-informed approach. Language should be clear, concise with articulate action steps and language shall be amended to match client needs and ability. Engagement strategies used should also take into account individual needs of the client. Mental health recovery shall be practiced along with stigma reduction and referral to services as needed. Harm reduction practices should be supported and practiced. Progressive and individualized engagement shall be practiced. Staff shall provide meaningful information to help clients exercise choice. Professional boundaries shall be maintained while developing trust and rapport.

7. Operational Documentation

For newly contacted unsheltered persons, staff shall ensure Universal Data Elements are recorded completely in HMIS within 3 business days of contact abiding by privacy standards in place.
For unsheltered persons previously enrolled in street outreach, staff ensure outreach activities and project exits are recorded completely in HMIS within 3 business days.

8. **Interface with Law Enforcement**

Unless mandated reporting is triggered, outreach staff shall never be the entity responsible for communicating or leading enforcement activities.

Whenever possible and when notified in advance of enforcement activities, staff shall assist unsheltered homeless in the event that law enforcement activities have dislodged or displaced them.

In the case of a planned closure of an encampment, staff shall provide intensive outreach efforts.

When law enforcement’s HOT undertakes outreach and engagement efforts and asks for staff assistance, staff shall assist if it will not undermine existing outreach efforts/relationships and when they are able.

Staff are mandated reporters to the degree required by law (CPS, APS, trafficking).

9. **Structured Engagement**

Ideally staff work in pairs and shall not have more than 4 people approach the same person at once.

Generally, outreach staff shall exit their cars when engaging unsheltered persons.

Outreach shall generally occur outdoors initially, though follow up engagement may occur in sheltered locations as needed but cannot be mandated nor expected and shall not consume more than 25% of outreach hours/week.

Staff shall verbally identify themselves, their organization, the intention of their engagement in every new engagement.

Services are voluntary and staff shall seek and record consent (documented verbal consent is ok).

If an unsheltered person does not want to engage, staff shall respect their wishes and make offers of service again in the future. Length of time between offers includes staff discretion but generally shall not exceed 7 days whenever possible.

Staff shall not employ any punitive measures for people who refuse services or who later want services.

10. **Inclement Weather or Other Emergencies:** Structured engagement activities may be suspended if it is important to assist in notifying unsheltered individuals of the impending weather event or emergency. Efforts shall be made to help unsheltered people prepare for the event and/or access available emergency resources.

11. **Provision of Goods:** Focus on housing and accessing other resources in the community may be of assistance in accessing/maintaining housing. While staff may provide hygiene kits, blankets, sleeping bags, harm reduction supplies, etc, provision of these materials shall never be the primary function of outreach. Staff are not obligated to make the provision of material available. Provision of goods should be used to advance progress toward goals, including housing & be mindful of not creating dependence.

12. **Interface with Other Service Providers and Government Entities**

Staff shall connect with coordinator to understand shelter availability during each shift and staff shall prioritize to whom shelter space is offered based on following hierarchical criteria: 1) vulnerabilities 2)
priorities as established for CE, 3) advanced notification by law enforcement to vacate a particular location.

When possible, staff shall leverage Housing Navigation Centers and day centers when following up with a known unsheltered person.

Staff shall assist people on their caseload in accessing benefits and income, including accompanying people to the social security office and helping navigate resources, including employment programs.

Veterans shall have the opportunity to be referred to VA and/or other veteran serving organizations.

Staff shall refer people to appropriate harm reduction resources as needed and when amenable.

Staff shall engage with appropriate entities to secure identification documents, when required.

13. Previously Unknown Unsheltered Persons

The majority of outreach time shall be with already known unsheltered people advancing the relationship and moving towards a solution to their homelessness. Less than 50%, and ideally no more than 25%, of time shall be spent identifying unsheltered homeless persons not previously connected to outreach.

For new contacts, staff shall engage in diversion and try to problem-solve an alternative or rapid resolution to their homelessness and complete appropriate documentation in HMIS. When rapid resolution is not possible, staff shall share available resources and make referrals as needed. If the person wants continued outreach services, staff shall complete enrollment including all required data entry in HMIS, and a plan shall be created to guide future engagements.

14. Staying Connected to Existing Unsheltered Persons

More than 50% and ideally 75% of time shall be spent re-engaging and serving unsheltered persons previously encountered and preferably already enrolled in outreach in HMIS.

Each staff shall have a minimum of 10 unsheltered persons and a maximum of 25 on their caseloads. At least 60% of their caseload must be persons actively working on activities or goals that directly assist the person moving towards housing, within or outside of CE.

People on caseloads must have at least one contact recorded in HMIS within each 30 day period to remain active. If the unsheltered person is hospitalized, incarcerated, or provisionally accommodated for more than 30 days, they should move to inactive status. Should they need to re-engage, if there is space on the staff caseload, they can immediately move from inactive to active.

Each day shall be planned, documented, and strategic in identifying who will be engaged and actions. Re-engagement activities shall be focused on moving towards housing. One staff task is to endeavor to verify chronic homelessness status when warranted. Additionally, efforts shall focus on ensuring being “document ready” to move in.

15. The interface with Coordinated Entry: Staff shall ensure people are added to the CES By-Name List if not already listed. Staff shall complete all necessary documentation to refer to CE if they are not already on the By-Name List. When a person has been identified as a match for a vacancy through CE, staff shall assist in locating the person and organizing transportation and connection to the housing opportunity.

16. Maintaining a Housing Focus
The main goal is movement towards housing across a range of housing (family, institutional care, ILF, roommates, etc).

Staff shall be knowledgeable of the housing process within and outside CE. When options are outside CE, staff shall support the person in accessing housing when it is a valid option. If there is a handoff to another organization or staff, it should be a warm handoff and staff shall maintain direct contact.

When a person does not desire or is ambivalent about housing, staff shall be respectfully persistent using MI and Assertive Engagement to support and assist the person in considering housing. Staff shall not force, coerce, bribe, trick, or bargain with people to accept housing.

Once a person moves into housing, outreach staff may follow up, engage and support transfer to Rapid Re-housing or PSH for a period no longer than 6 weeks from the beginning of the lease. 6 weeks is still the goal if the housing is outside CE, but exceptions may be made depending on resources available to support housing stability.

17. Geographic Coverage and Overlap: Contracted areas must be covered by outreach services in its entirety at least once every 2 weeks. Overlapping teams shall coordinate to reduce duplication and share info as necessary.

18. Hours of Service: Services shall be provided in hours based on contract. Organizations shall endeavor to provide services at different times of the day including early morning and evening hours as well as weekends where possible. Coordination with overlapping teams shall aim for maximum coverage and report coordination issues to the coordinator.

19/20 [sic]. Transportation: Staff shall provide transportation when the referral source is not reasonably walkable/accessible via agency vehicle, public transit, private transit and may require accompaniment. Prior to providing transportation, staff shall determine appropriateness based on the person’s current state of mind and safety.

21. Provision of Information: Staff must maintain current knowledge of resources including regionally specific and some across the county. Resources shall be provided in writing if requested. Staff shall inform people of 211 Community Information Exchange as a resource as appropriate.

22. Consent

Staff shall attempt to collect explicit consent to share data within HMIS. Until consent is received, staff shall follow current HMIS guidelines and policies to correctly restrict client data within HMIS as well as how to make the data unrestricted once/if consent to share information is later granted.

Staff/organizations are responsible for maintaining records of consent to receive services as well as consents to release/share information.

Staff shall ensure HMIS consent is in place prior to entering data into HMIS in accordance with training.

In rare instances where individuals may not be cognitively well enough to provide consent, staff shall work with allied professionals to have a capacity assessment completed on the person to determine their legal ability to provide consent for themselves.

23. Confidentiality

Confidentiality shall be maintained unless released to share and then done in accordance with release.
Electronic records shall be password protected to decrease the potential of a privacy breach.

Physical notes taken on paper shall remain confidential during and after work hours and stored in a locked box if in vehicles.

PHI shall not be disclosed to any 3rd party without explicit consent or legal mandate.

24. **Record Keeping**

Staff shall meet employer requirements for record keeping as well as contractual requirements.

Staff shall respond to an unsheltered person’s requests about what information is stored, where, and how it is protected, as well as how to amend that information in the future.

An unsheltered person may request staff maintain their identification or other records for them for safekeeping. This can only be done with an active agency policy to guide this process and must be recorded.

25. **Case Conferencing**

With consent/release, case conferences may be held to improve engagement, services, or follow through. Whenever possible, the unsheltered person shall be invited to attend the case conference.

The regional coordinator shall convene a quarterly case conference to discuss persons in the region that have expressed interest in housing but have been homeless for 12 months or more and not on a pathway to housing. If staff are invited, they shall make every effort to attend.

26. **Warm Handoffs** - all reasonable efforts shall be made to ensure transferring to another contact is complete, transparent, appropriate info is shared.

27. **Grievances** - organizations must have a grievance policy in place and accompanying procedures for investigating and taking necessary action. Once a person consents to receive services, they should be made aware of the grievance policy.

28. **Equipment**

Staff shall have a phone with them at all times during delivery of outreach services.

Each outreach team shall have a First Aid kit during the delivery of outreach services.

Staff shall have access to a computer/tablet for the purposes of data entry into HMIS, case notes, email, and resources.

29. **Encountering a Homeless Individual in Distress:** Efforts will be made to engage and address distress, when necessary mobilizing first responder to assist, possibly even without consent if it is deemed an emergency. Outreach staff may remain with the person until first responders arrive and relay pertinent info in support of the person. An incident summary may be required.

30. **Encountering a Homeless Person Who is Deceased:** 911 should be called and staff shall administer efforts to revive in accordance with agency policies and training. An incident summary may be required.

31. **Encountering a Homeless Individual During Non-Work Hours:** Staff shall not acknowledge the person specifically unless the person first acknowledges staff and outreach activities are not to occur during non-work hours. Staff shall maintain confidentiality.
32. **Responding to Encampments:** There should be monthly reporting of encampments to regional coordinators. Staff may not help construct an encampment. Staff shall not enter into tents or other encampment structures during service provision. Staff shall not provide materials making encampment cleanup more difficult if they are aware of pending closure by officials.

33. **Service Restrictions:** Service restrictions may be issued in rare circumstances for safety/threat/property destruction. Service restrictions may be issued verbally but must also be documented. First time restrictions cannot exceed 7 days. Subsequent restrictions to the same person for the same behavior cannot exceed 14 days. No permanent restrictions for individuals are permitted, however, specific staff may be exempt from interacting with specific clients.

34. **Engagement on Public Property and Private Property:** Outreach shall be on public property in the funded area. Public buildings in the service area may be used and representatives shall be informed of use and permission shall be gained (should not exceed 25% of staff time). Quasi public spaces (parking lot by strip mall) are allowable unless expressly requested by the owner not to engage there. Outreach on private property is not permitted without explicit owner permission.

35. **Coordinating with Health-Focused Activities Serving Unsheltered Persons:** With consent, location shall be provided to facilitate this connection. Health related info shall not be shared without consent. With consent, staff shall exchange relevant information with health providers about housing and services.

36. **Participation in Collaboration and Meetings:** Outreach staff shall support PIT Count. Efforts to decrease duplication and maximize provider strengths via joint planning and coordination shall occur. Staff participate in meetings, gatherings, and trainings organized by the regional coordinator, system coordinator, or funder. Cooperate with law enforcement related to Outreach. Collaborate with non profit, health, homeless and social service providers. Cooperate with neighborhoods.

37. **Monitoring:** Internal oversight should be demonstrated. Underperformance shall be accompanied by demonstration of steps attempting to remedy underperformance. Funders may monitor street outreach performance. Non-compliance with standards may lead to a remediation plan or loss of funding.

38. **Amending Street Outreach Standards:** Standards shall be formally reviewed at least every 3 years lead by RTFH. In intervening periods, funders shall collaborate to make changes. Barring legal mandates for quicker action, there should be a minimum of 30 days before changes take effect. Contracted providers may request amendments via request to RTFH in writing including their rationale and recommendation. A response shall be provided within 30 days.

**Basis for Conclusions**

**Conceptual Analogies of “Trust” & “Rapport” as a Position and “Referrals” as Activity in Street Outreach**

Because street outreach processes are naturally iterative, there is value in recognizing progress in that trust and rapport building over time. Therefore it is possible to conceive of trust and rapport through proxy measurements of population size and the frequency with which re-engagement occurs. In other words, such reporting in the notes of Statements of Financial Position would give a reader a sense of how
much trust and how strong that trust is with a body of persons, even by geography should the organization elect to report that way.

Trust building alone, however, is not the outcome the region desires, and it is merely an output. Therefore to see action with that trust, reporting referrals to reasonably accessible services or frequency of changes in Composite Scores indicates the good faith efforts to try to drive to outcomes.

Finally and with the understanding that system-wide inventory of services and housing do not match the likely and dynamic demand, the reporting of referrals without space availability permits the future assessment of where resources could be dedicated to create more supply.

Alternative Views and Risk Areas That May Need Addressing in Future Revisions

While the PROS Board asserts the standard presented here for comment provides a sufficient balance between activity and outcomes and also acknowledges that organizations have conditions outside their control, it is important to note that the view on what is “successful” or “not successful” in outreach varies significantly.

Some experienced outreach workers have expressed thematically that any outreach is good outreach. The PROS Board notes that the standards here deviate from that assessment in that outreach is only recognized if trust is built marginally and demonstrable through recording of information in HMIS.

Alternatively, some funders have expressed that organizations conducting outreach programs should be able to demonstrate efficiencies in achieving outcomes of referrals to case management or services. While the PROS Board generally concurs with that viewpoint, the inclusion of other balanced metrics in this standard explicitly acknowledge that achieving outcomes efficiently requires an understanding of what is available geographically and the time it takes to build trust with individuals experiencing homelessness. In other words, outcome measurements alone would fail to demonstrate performance in outreach.

Finally, some service provider management, not all in outreach however, were unfamiliar with the SD COC outreach operational requirements. This standard makes no evaluation of those requirements’ adequacy or efficacy, but merely creates measurement and reporting requirements for organizations conducting outreach programs with the regional acceptance of those COC operational requirements.
Appendix B

Example Specific Applications of this Standard

Municipal Agencies with Homeless Outreach Teams

Municipal agencies with homeless outreach teams will need to consider in what financial and performance reviews the reporting pursuant to this standard are included. It seems wholly appropriate that, if addressing homelessness is a significant priority of elective office holders, then these measurements and reporting ought to be completed for Comprehensive Annual Financial Reports (CAFRs). Certainly these measurements and reports ought to be completed for reports of departments, like law enforcement if engaged deliberately in outreach services, or subordinate agencies, where applicable.

Service Providers with Substantive Portfolio of Outreach

At a minimum, service providers should detail the information pursuant to this standard in their audited financial statements and any annual performance reports.

Appendix C

Notes to Help Readers of Performance or Financial Reports Following This Standard

Potential Investors in an Outreach Provider

When considering initial or further investment in an outreach provider, there are several ratios that an investor could determine when an outreach provider reports and discloses information pursuant to this standard.

If an investor is concerned primarily with the scale of impact of an organization conducting outreach services, it is possible to simply focus on an outreach organization’s ultimate referral activities by reviewing notes in statements of activity and reviewing the proportions of successful outreach encounters that led to referrals or advancement of the individuals’ Composite Scores.

It is quite possible that an organization conducting outreach services may be engaging with individuals in areas where there is insufficient space availability of services, as indicated through the reporting. That could be an indicator that the organization may be working in an area where it geographically cannot be effective. The investor has to then decide, however, if the organization is good at building “trust” and “rapport” by reviewing the notes in a statement of financial position. It could be that, while the organization cannot refer individuals because of factors beyond their control, they can at least build trust
at a speed sufficiently acceptable to funders to lead to continued investment. As such, funders may decide to invest other funds in building the capacity of agencies to which the outreach organization can refer. Alternatively, funders may see that trust building is slower than is desirable, and, given the lack of other referrable resources, elect to put their funds elsewhere entirely.

Finally, funders may see that an organization conducting outreach services is performing effectively in outreach activity and does not encounter the lack of space availability challenges that seem to be prevalent and that the trust building is done at scale and at the speed they wish to fund. Then the investor has to decide if they wish to grant additional funds to focus this organization elsewhere geographically or to fund another organization conducting outreach elsewhere, because it could be that further investment in success in the same area would – ironically – be an overinvestment of limited resources at your disposal.

Board Directors or Executives of an Outreach Provider

When considering strategic or operational decisions on outreach, there are several pieces of derivable information that a board director or executive could use.

For instance, if the number of individuals unable to refer to case management or services is low, then that could be an indicator the organization conducting outreach programs is operating in geographic areas where supply of services nearly meets demand. Conversely, if that number is high, especially relative to the number of individuals referred to case management or services, then it could be an indicator that the organization needs to expand its referral base or that it is over exhausting resources and time on individuals for whom services are unavailable.