TRAINING MANUAL

VI-SPDAT
Vulnerability Index – Service Prioritization Decision Assistance Tool
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Introduction

The SPDAT and all of its associated products (VI-SPDAT, Family SPDAT, Family VI-SPDAT, Youth SPDAT, Next Steps Tool for Youth, Justice Discharge VI-SPDAT, Diversion and Prevention Family VI-SPDAT, Diversion and Prevention VI-SPDAT) developed by OrgCode Consulting, Inc are the most used suite of products in the world in triaging and assessing the needs of homeless populations. They are vetted through experts in trauma, domestic violence, and through lenses of anti-oppression and cultural competency. They are rigorously tested and all grounded in evidence with considerable academic scrutiny.

The VI-SPDAT, or Vulnerability Index – Service Prioritization Decision Assistance Tool, a pre-screening, or triage, tool designed to be used by all providers within a community to quickly assess the health and social needs of homeless persons and match them with the most appropriate support and housing interventions that are available. The VI-SPDAT allows homeless service providers to similarly assess and prioritize the universe of people who are homeless in their community and identify whom to treat first based on the acuity of their needs. The VI-SPDAT was not intended to provide a comprehensive survey of each person’s needs.

The VI-SPDAT helps communities to determine the level of need of persons experiencing homelessness quickly and match them to the most appropriate, rather than the most intensive housing interventions available. In some cases, the VI-SPDAT may help make the case for Permanent Supportive Housing. In other cases, it may encourage practitioners to choose Rapid Rehousing or to not offer housing interventions when clients are statistically likely to resolve their homeless situation on their own. While the tool is rooted in exhaustive research, service providers should use the recommended intervention to inform housing intervention decisions.

The 4 domains of the VI-SPDAT

The Housing and History of Homelessness determines chronicity including the number of times someone has been without housing. The Risk domain surveys the household for risk of harm to self or others, involvement in high-risk and/or exploitive situations, interactions with emergency services, and legal issues. The Socialization and Daily Functions domain surveys the household on their self-care and daily living skills, their personal administration and money management, their meaning daily activities, and their social relations and networks. The Wellness domain surveys the household of their mental health and wellness, cognitive functioning, their physical health and wellness, medications, substance use, and experience of abuse and/or trauma.
End-user Agreement

VI-SPDAT Surveyors have a moral and legal obligation to ensure that the data they gather is being collected, accessed and used appropriately. It is also the responsibility of each Surveyor to ensure that client data is only used to the ends to which it was collected, ends that have been made explicit to clients and are consistent with the mission to assist families and individuals in our community to resolve their housing crisis. Proper Surveyor training including HMIS User training, adherence to the HMIS Policies and Procedures Manual as well as this manual, and a clear understanding of client confidentiality are vital to achieving these goals.

When and Where to Conduct the VI-SPDAT

After an individual or household has entered a crisis response system, completion of a survey helps determine the level of need of the persons experiencing homelessness and helps inform referral decisions to connect them to the most appropriate housing or service intervention to end homelessness quickly.

The Lowcountry Coordinated Entry System outlines the process for VI-SPDAT administration as follows:

All emergency shelter/crisis response providers complete the VI-SPDAT on all households in shelter as outlined below:

- The VI-SPDAT should be completed no sooner than 5 days after shelter entry, and no later than 8 days after entry.
- Results of the VI-SPDAT should be entered in HMIS, per the Lowcountry CoC HMIS Policies and Procedures and Data Quality Standards.

Emergency shelter/crisis response providers complete the VI-SPDAT immediately, or take other action, in the following cases:

- Any individual encountered during outreach that is living in an unsheltered location and must remain unsheltered (i.e. individual declines shelter or limited bed/hotel voucher availability) must be assessed immediately.
- If a resident seems to need assistance to exit shelter ASAP for their well-being: exhibiting severe mental health needs/issues), survey may be done immediately.
- Individuals/households with previous episodes of literal homelessness, including those identified as chronically homeless, must have their survey done immediately at entry into the shelter.
Information about past episodes of literal homelessness must be collected during the intake process (and entered into HMIS for HMIS participating shelters). This data should be used to identify households needing immediate survey.

- Homeless veterans are immediately referred to the local SSVF provider. No survey needs to be done by the shelter provider unless the veteran has declined SSVF assistance or is determined to be ineligible for VA assistance.
- Individuals/households should be re-assessed under the following circumstances:
  - The nature of homelessness has changed significantly, i.e., someone has become seriously ill, a head of household change, or any situation that renders the individual or household eligible for greater or lesser intensity of services.

Homeless Categories
The VI-SPDAT is reserved for households that are either Category 1 or Category 4 Homeless as HUD defines these terms. Surveys should not be given to anyone who is not category 1 or 4; couch surfing does not qualify.

**Category 1:**
Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning:

- Has a primary nighttime residence that is a public or private place not meant for human habitation;
- Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
- Is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution
Building Rapport

The VI-SPDAT is a self-report tool. Many of the questions are of a sensitive nature. Without rapport, clients may not be comfortable answering or answering honestly to these questions. Dishonest answers result in an inaccurate survey. Additionally, questions of sensitive nature can be triggering; without rapport you can be putting yourself and the client in an unsafe situation. Rapport helps you to recognize when someone is becoming triggered and determine if the survey should be revisited another day. It also helps you to prepare the client to be able to answer uncomfortable questions in a safe environment.

If at any point during the survey, the client expresses or appears that they are being triggered or becoming upset, please stop the survey and schedule it for another day.

Introducing the VI-SPDAT

How the VI-SPDAT is introduced to clients can have significant implications. Therefore, it is important that every assessor utilize an introductory script during survey so clients understand what the VI-SPDAT is, why it is being used, how the results will be used, and issues surrounding privacy.

The VI-SPDAT includes an opening script. Every assessor in your region, regardless of organization completing the VI-SPDAT, should use the same introductory script; you must highlight the following information:

- The name of the assessor and their affiliation (organization that employs them, volunteer as part of a Point in Time Count, etc.)
- The purpose of the VI-SPDAT being completed
- That it usually takes less than 7 minutes to complete
- That only “Yes,” “No,” or one-word answers are being sought
- That any question can be skipped or refused
- Where the information is going to be stored
- That if the participant does not understand a question that clarification can be provided
- The importance of relaying accurate information to the assessor and not feeling that there is a correct or preferred answer that they need to provide, nor information they need to conceal

Category 4:
Any individual or family who:
- Is fleeing, or is attempting to flee, domestic violence;
- Has no other residence; and
- Lacks the resources or support networks to obtain other permanent housing
Where Should You Conduct the VI-SPDAT?
When conducting the VI-SPDAT you are collecting clients’ Personal Protected Information (PPI) and asking personal questions that are sensitive in nature. It is the surveyor’s responsibility to conduct the VI-SPDAT in a safe environment. The surveyor needs to consider whether the location is a place where both the client and they are comfortable. The surveyor also needs to consider the risk of someone else overhearing the information the client is providing.

VI-SPDAT Tools
Our community is currently using 3 different VI-SPDAT tools: Single, TAY, and Families. These tools are imbedded in HMIS; paper version can be located on our website. If conducting a paper VISPDAT, it must be entered into HMIS within 24 hours.

**VI-SPDAT 2.0 for Individuals**
The VI-SPDAT Prescreen for Single Adults is to be conducted with single adults, 25 years of age or older, with no minor children. For households with multiple adults and no minor children, a VI-SPDAT needs to be conducted with each person.

**VI-SPDAT 2.0 for Families (F-VI-SPDAT)**
The VI-SPDAT Prescreen for Families is to be conducted with any household with at least 1 adult and 1 minor child. In households with multiple adults it is necessary to identify one of them as the Head of Household. Only one Family VI-SPDAT is required for the entire household. However, for households with multiple adults, we would recommend conducting additional VI-SPDATs on any adult not legally related to the minor child; or in the case where the additional adults are TAY adults with no minor children of their own, a TAY VI-SPDAT.

**VI-SPDAT for Transition Age Youth (TAY-VI-SPDAT)**
VI-SPDAT for Transition Age Youth (TAY-VI-SPDAT) is used when the household is a single person that is 24 years of age and younger. If the TAY household includes more than one person and children, use the F-VI-SPDAT.

<table>
<thead>
<tr>
<th>Family composition</th>
<th>Which VI-SPDAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 adult 25 or over</td>
<td>Single VI-SPDAT</td>
</tr>
<tr>
<td>2 adults 25 or over</td>
<td>Single VI-SPDAT for each adult</td>
</tr>
<tr>
<td>1 adult any age and at least 1 child under 18</td>
<td>Family VI-SPDAT</td>
</tr>
<tr>
<td>2 adults any age and at least 1 child under 18</td>
<td>Family VI-SPDAT</td>
</tr>
<tr>
<td>Multiple adults and at least 1 child under 18</td>
<td>Family VI-SPDAT and Single VI-SPDAT for those not related to the minor</td>
</tr>
<tr>
<td>1 person 24 or under</td>
<td>TAY-VI-SPDAT</td>
</tr>
<tr>
<td>2 people 24 or under</td>
<td>TAY-VI-SPDAT for each person</td>
</tr>
<tr>
<td>1 adult 24 or under and at least 1 child under 18</td>
<td>Family VI-SPDAT</td>
</tr>
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<td>2 adults 24 or under and at least 1 child under 18</td>
<td>Family VI-SPDAT</td>
</tr>
</tbody>
</table>
Before Starting the VI-SPDAT
Inform client about the VI-SPDAT and HMIS
What is the right messaging when explaining the Coordinated Entry survey and system?
Giving the right message about the coordinated entry system is vital to its success. Clearly explaining the benefits of participating in the Vulnerability Index-Service Prioritization Decision Assistance Tool (VI-SPDAT) survey will encourage people to participate. It is equally important that individuals understand that participation does not guarantee housing. Participants should receive a detailed explanation of where their information will be shared.

Suggested Messaging Script
“I’d like to tell you about a short survey that we could do together that would help us learn more about you and will give us recommendations to help you move out of homelessness. The answers will help us determine how we can go about supporting and housing you. Would you like to hear more?

The short survey will take about 20 minutes for us to complete.
Most questions only require a Yes or No. Some questions require a one-word answer. I’ll be honest; some questions are personal in nature. We ask that you are honest with your responses.

The information collected goes into secure database known as HMIS (Homeless Management Information System). After the survey, I can share its recommendations with you and give you some basic information about resources that could be a good fit for you. I want to make sure you know there are very few housing resources connected to this survey, so it’s unlikely that you will receive housing right away. The main benefit to doing the survey is that it will help identify your needs and help match you with resources available to you through this program.

Based on our conversation, I may recommend that we do additional paperwork to help you apply to additional housing programs.

Your survey information will be available to the service providers that participate in the Lowcountry Coordinated Entry System and used to determine if you are eligible for any of the participating housing, service and other related programs. Your information is shared so that: You don’t have to complete the survey multiple times; housing providers can identify the people eligible for housing resources as they come available; and the programs in the Lowcountry can identify the overall need for housing and the type of housing needed. This information can be used to better plan how to increase the housing resources available in the city and to advocate for sufficient housing resources to end homelessness.

Would you like to take the Survey with me?”

If yes, ask individual to sign release of information and explain about the HMIS (Homeless Management Information System) before proceeding with the Survey.
DOs and DON’Ts of VI-SPDAT
When explaining the VI-SPDAT and the Lowcountry Coordinated Entry System to a Client:

- **DO** explain **Lowcountry Coordinated Entry System** as a collaboration of service providers working to streamline services to help connect homeless individuals to available resources and appropriate housing.
- **DO** ask a client to sign the HMIS consent form prior to conducting the survey.
- **DO** explain the VI-SPDAT as a survey that enables our network of service providers to understand their needs, program eligibility, and assist in matching them to the best resources available.
- **DO** read all questions as is to the client. The order of the VI-SPDAT cannot change. As a self-reported tool, the sequence is vitally important. An individual must provide informed consent prior to the VI-SPDAT being completed.
- **DO** provide clarification of any questions the client expresses or appears to not understand,
- **DON’T** complete the VI-SPDAT solely through observation or using known information within your organization.
- **DON’T** change client answers because you believe they are being dishonest.
- **DON’T** mention that people will receive a score after participating in a VI-SPDAT, and **DON’T** give them the score.
- **DO** explain Rapid Rehousing (RRH) or Permanent Supportive Housing (PSH) and how each type of housing program caters to a client’s needs.
- **DO** empower and encourage those who score <5 to utilize community resources to exit homelessness on their own.
- **DON’T** guarantee housing to a client or give them a timeframe in which they will be housed.
- **DON’T** tell a client that the most vulnerable are being prioritized for housing. Please remember that we are using the VI-SPDAT to match people to appropriate housing.
- **DON’T** ever go back into and Survey to change answers, the system logs all changes. If you change answers, your HMIS account will be deactivated.

List of Participating Agencies
A current List of Participating Agencies can be found at [https://lowcountrycoc.org/coordinated-entry](https://lowcountrycoc.org/coordinated-entry). This information is updated as new programs begin taking referrals from Coordinated Entry.
Common Challenges
As Lowcountry CoC providers have administered the tool, common challenges have been raised. This section provides further explanation or proposed solutions for how best to address these concerns.

Yes or No Responses
Some providers have expressed concern about questions being overly personal, but requiring a yes or no response. VI-SPDAT questions are designed to elicit “yes” or “no” answers. This way if a client is asked about having engaged in a (list of) risky behaviors and the particular behavior they engaged in is not on the list, then the phrase, “anything like that” should elicit a “yes” or “no” response. In addition, assessors do not want to know which behavior was engaged in, just whether or not there was risky behavior.

While we recognize the tool is designed to elicit these responses, we encourage providers to take a person-centered approach when administering the tool, and suggest that assessors provide time after the survey for clients to discuss any sensitive topics that may have been covered.

Trusting the VI-SPDAT and the Resulting Score
Some providers have expressed concern that the score the VI-SPDAT generates as a result of the survey does not accurately reflect their client’s true need for services. There are at least two important points to keep in mind here:

- The VI-SPDAT is a scientifically developed instrument employing research-based practice. Experience using the tool has shown providers that they can trust the results; in addition:

- In the Lowcountry CoC we encourage providers to utilize the VI-SPDAT score to inform housing referrals. If there are instances that the score appears to not adequately capture the level of need, staff may advocate for their clients using information at their disposal (i.e. information shared during case management) that is not reflected in the score.

- Note: the VI-SPDAT Online Training mentions “housing encouragement” as a score level. This is the same as “no housing intervention,” which is how it is listed on the VI-SPDAT tool.

Clarifying Questions for Informational Purposes
Some providers have expressed concern over clients not understanding terms used in VI-SPDAT questions. As referenced above in the opening script, if a participant or assessor does not understand a question, clarification can be provided. In order to not alter the question in a way that could impact scoring, focus on providing clarity on terms within the question rather than reframing the question.
Training
Lowcountry CoC VI-SPDAT Training includes the following:

- **VI-SPDAT Instructional Guide (REQUIRED):** providers must review this document in its entirety.

- **VI-SPDAT Online Training (REQUIRED):** providers must complete the training in its entirety. The training features guidance from OrgCode on the VI-SPDAT as well as instruction on how to administer the tool.

- **VI-SPDAT Mock Interviews and Shadowing (Recommended):** new users may conduct mock interviews or shadow users who have experience administering the VI-SPDAT. To protect client confidentiality, any user that shadows staff assessing a client must be a HMIS end user unless the staff member shadowing works in the same organization and has signed consent from the client. Coordinated Entry staff is available to shadow VI-SPDAT surveys and provide additional guidance upon request.

*Once the above items are complete, the supervisor will submit the VISPDAT training form to notify the CoC. This document can be found on our [website](http://example.com)*