Making Zero Count

Service Coordination Resources Handbook

canadian observatory on homelessness

TURNER | STRATEGIES

Acknowledgements

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How to cite this document:
Burkholder-Harris, K., Mifsud, A., & Turner, A. (2019). Making Zero Count: Service Coordination Resources Handbook. Toronto: Canadian Observatory on Homelessness Press.

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Design/layout credit to Sarah Anne Charlebois, Canadian Observatory on Homelessness
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Funded in part by the Government of Canada's Homelessness Partnering Strategy's Innovative Solutions to Homelessness. The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.

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Foreword:

In our consultations with communities, it became clear that while many communities have made significant strides to integrate approaches across the homelessness-serving system, it is difficult to implement systems integration at the case management level.

> Often there are no clear processes to follow, especially when it comes to working within a cross-agency team.

The hope is that these resources and tools can be used in tandem with existing data collection methods such as Point-in-Time counts, HIFIS/HMIS and By-Name Lists – for communities to access.

Purpose:

These resources are intended to support you in developing a **coordinated process** for working across agencies. This handbook is not a case management tool, but rather, it is meant to help you coordinate the sharing of information across agencies in a consistent and planned way. It is meant to clarify some of the basic information that often gets lost as people work across agencies with a single person.

Ultimately, this is about doing **Collective Impact** work on a micro-level. This means that there is a common set of goals (working with the person requiring support), and multiple stakeholders from different agencies working together to support that individual. To that end, we have adapted the Collective Impact framework for a frontline context to support service coordination.

We hope that the tools and resources found in this handbook can be implemented within communities to ensure that they are useful and practicable on the ground. With an improved ability to define and measure an end to homelessness, we can more strategically and efficiently move towards our collective goal.

Purpose:

To prevent duplication or key tasks getting missed when there are multiple agencies supporting one individual in the homelessness serving system.

To strengthen consistent communication across multiple agencies all working with one person.

Target Audiences:

Case Managers & frontline staff

Resource 1

How to - Implementing the Conditions of Collective Impact for Service Coordination:

It can be difficult to work across organizations for a common purpose. Agencies have different mandates, protocols, and resources which makes it challenging to work collaboratively to support one person. Under the Housing First philosophy[1], which houses people without any preconditions, we are asking a group of people to achieve a bigger, but more manageable goal, rather than expecting any one worker to take it on by themselves. This is called Collective Impact.

> "**Collective impact** is the commitment of a group of actors from different sectors to a common agenda for solving a specific social problem, using a structured form of collaboration[1]."

However, we are applying collective impact at a micro-level, where one person has a number of goals, pulling the team together, and each worker has a particular role in that process. There are five major conditions that need to be in place for Collective Impact to be effective. Below we have adapted these key conditions for frontline workers.

Five Conditions of Collective Impact:[3]

1. Common Agenda
2. Shared Measurement
3. Mutually Reinforcing Activities
4. Continuous Communication
5. Backbone Support

3. Stephen Gaetz, Fiona Scott & Tanya Gulliver (Eds.) (2013): Housing First in Canada: Supporting Communities to End Homelessness. Toronto: Canadian Homelessness Research Network Press.

2. Weaver, L. 2014, July 4. The Promise and Peril of Collective Impact. Retrieved on March 20, 2019 from https://thephilanthropist.ca/2014/07/the-promise-and-peril-of-collective-impact/

3. Ibid.

1. Common Agenda

All workers have a shared understanding of the goals set by the person requiring support. These need to be clearly explained by the individual accessing support.

▷ **E.g.** The person receiving support states that they want to find an apartment.

2. Shared Measurement

All workers must determine a clear way of understanding how to know if the goal and related tasks to the goal have been achieved, so that workers can remain aligned and hold each other accountable.

▷ **E.g.** Moving into a safe place would be the final outcome being measured here, but process-based indicators could also include: calling landlords, setting up a rent deposit, or applying for a rental supplement.

3. Mutually Reinforcing Activities

Participants activities must be differentiated while still being coordinated through a mutually reinforcing plan of action.

▷ **E.g.** If a person is looking for housing, one worker may be focused on applying for a rent supplement so the individual can afford housing. Another worker may be doing an apartment search with the individual. The other worker may be helping the person to pick up housing supplies such as kitchenware or cleaning supplies. All of these mutually reinforce the goal of housing, but are different roles.

4. Continuous Communication

Continuous and open communication is needed across the various players to build trust, assure mutual objectives, and appreciate common motivation.

▷ **E.g.** In a frontline context, this means that consent forms must be signed between all players, if the individual being supported is comfortable with this. As a group of workers is supporting a person to find housing, the key is confirming the format for communication. As the resources below outline, this could be a quick email update, group text, or some other form. However, as each agency will have different limits to sharing information, it is best to adhere to the agency with the strictest policy.

5. Backbone Support

There needs to be a clear lead in the case of co-ordinating a service plan with multiple workers. This person will likely take on the role of ensuring updates are shared with the full team as well as planning and facilitating any case conference meetings.

▷ **E.g.** This role can likely be determined by job description. For example, if there is a full time Case Manager, this would likely be a more relevant “backbone” coordinator than that of the mental health counselor who focuses on one area of support.

Resource 2

How To - Facilitating Service Coordination Meetings:

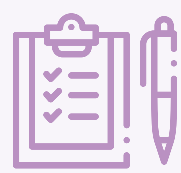
The next few resources may seem similar to case conference tools. However, the emphasis here is less on the actual goals that the person being supported identifies, and more on the **coordination of the workers** involved, **using a systems integration approach.** All of this work is happening in the context of a Housing First-oriented system, where **the micro-level work supports the larger community goals of preventing, reducing, and ending homelessness.** Agencies may find themselves working together with unusual partners in this way.

Template 1.0 outlines a meeting agenda where the person receiving services is present.

Note:

It is assumed that the "backbone support" worker has called this meeting, and will take the lead in facilitating.

However, if another worker has taken the lead, that will work as long as it is clear in the meeting and follow-up who will take on that coordination role moving forward.



Tip: it's easier if consent forms are signed in advance, though this may not always happen!

Following the Housing First principles, it is critical to ensure that this conversation is one in which the person's choice and autonomy is honoured throughout[4]. Part of doing that is to continue to frame the process where the individual is a part of the team, both in terms of choosing goals as well as the skills and strengths they bring to the team.

The following agenda leaves space for these questions throughout the meeting, and to ensure that each part of the meeting is done in step with the person being supported. It is necessary, however, to ensure that the people present at the meeting have all been approved by the person receiving support.

4. Polvere, L., MacLeod, T., Macnaughton, E., Caplan, R., Piat, M., Nelson, G., Gaetz, S., & Goering, P. (2014). Canadian Housing First toolkit: The At Home/Chez Soi experience. Calgary and Toronto: Mental Health Commission of Canada and the Canadian Observatory on Homelessness.

Template 1.0

Agenda for Service Coordination Meeting with Person Receiving Support:

Welcome & Introductions

Discussion of Job Descriptions

▷ **What is everyone's role at the table?**
- Ensure that each person speaks, including person being supported - reinforcing that they are an active member of the team.

▷ **What does each person bring as their strength to the group?**
- Again, ensure that the person supported is brought into this conversation.

Exploring Individual's Context & Goals

▷ **What is one area that the person being supported wants to focus on with this group?**
- How can this team support the individual to get there?
- Break down the goal into smaller tasks.
  - → Use Template 4.0, if helpful, to assign who is the lead for each task.

▷ **What resources can everyone bring to the group?**
- E.g. Some agencies may come with rent supplements. Another may come with culturally competent programming. Another agency may provide outreach capacity, etc.

▷ **What is the housing situation like for the person being supported?**

▷ **How long have they been experiencing homelessness?**

What happens if you do nothing

▷ **Ensure the person being supported** has the chance to explain what may happen in the foreseeable future if they do not receive support.

Consent & Information Sharing

▷ **Does the person being supported consent** to all of these agencies sharing updates about supporting the goal with each other, so that they can ensure the work is happening and not being duplicated?
- If yes, sign consent forms for all in the room. Feel free to use and adjust Template 2.0 for an example if needed.
- If not, ask the person to clarify who they want to do what tasks that will support them best? (Use the Service Coordination Cover Sheet Template 4.0 if useful, so that it is clear to all present).

▷ **How will the group share information with each other for key updates?**
- Determine the easiest way to provide quick updates for everyone. It may be something as simple as a group text (which is why everyone's contact info is on the Service Coordination Template).
- Keep it is simple and sustainable as possible.

Wrap-up & Date for Next Meeting

▷ **If there is a next meeting required, set the date, time, and location.**

▷ **Thank everyone for coming.**

Meeting Checklist

❑ **Does everyone involved have a clear role leaving the meeting?**

❑ **Is there a communication mechanism** (Group text, Email, etc.) to keep everyone up to date as developments related to the goal happen?

❑ **Does everyone have a clear consent form signed?**

❑ **Is the next check-in set up?**

Resource 2

Discussion - Breaking Down the Agenda:

The following section breaks down the various components of the agenda in greater detail. Note that this section uses the agenda for when the person receiving support is present. However, the notes apply to both when they are present and when not.

Discussion of Job Descriptions

- **What is everyone's role at the table?**
  - Ensure that each person speaks, including person being supported - reinforcing that they are an active member of the team.
- **What does each person bring as their strength to the group?**
  - Again, ensure that the person supported is brought into this conversation.

It is best to begin the meeting with a discussion of everyone's role is in the care team. Job descriptions will help clarify the division of tasks between workers, and other factors such as agency mandates will also guide this discussion.

Outlining everyone's individual strengths is a valuable discussion to have with the group. This not only helps build trust with the individual being supported, but it also shows them they're bringing their skills and strengths to the process.

Exploring Individual's Goals

- **What is one area that the person being supported wants to focus on with this group?**
  - How can this team support the individual to get there?
  - Break down the goal into smaller tasks.
    - → Use Template 4.0, if helpful, to assign who is the lead for each task.
- **What happens if you do nothing? What does the person receiving supports think will happen in the foreseeable future if they do not receive the support they need?**
- **What resources can everyone bring to the group?**
  - E.g. Some agencies may come with rent supplements. Another may come with culturally competent programming. Another agency may provide outreach capacity, etc.

This meeting is about establishing clear communication and service protocol between multiple workers supporting one individual. Keep the focus of the meeting on the individual's goal. As you work with the individual to break down the steps to get to that goal, you are establishing "mutually reinforcing activities" critical to any Collective Impact effort. Make sure that each step has a worker assigned to take the lead with the person.

Consent & Information Sharing

▷ **Does the person being supported consent to all of these agencies sharing updates about supporting the goal with each other, so that they can ensure the work is happening and not being duplicated?**

- If yes, sign consent forms for all in the room. Feel free to use and adjust Template 2.0 for an example if needed.
- If not, ask the person to clarify who they want to do what tasks that will support them best. (Use the Service Coordination Cover Sheet Template 4.0 if useful, so that it is clear to all present).

▷ **How will the group share information with each other for key updates?**

- Determine the easiest way to provide quick updates for everyone. It may be something as simple as a group text (which is why everyone's contact info is on the Service Coordination Template).
- Keep it as simple and sustainable as possible.

If the person receiving support is not present at the meeting, then the consent forms should have been signed prior to the meeting. However, if the individual is present at the service coordination meeting, there may need to be more conversations between staff regarding the individual's comfort level with sharing their personal information.

Ensure that it is clear to the person that their information is confidential to these agencies and that the reason for ongoing communication is simply to provide key updates about the tasks assigned. (Especially if certain tasks depend on the completion of other tasks in order to begin.)

If the person does not want to share the information with all agencies, ensure that there is space to do so. See example on Template 2.0. Some form of follow-up communication will be needed, in order to ensure that the work continues to move forward. As mentioned before, continuous communication does not mean that case notes are being shared. Each agency may have a different system, and confidentiality requirements would limit shared access in many cases.

Key updates to the team of workers supporting the individual is necessary in order to make sure that everyone is sticking with their roles and not duplicating. Suggestions include a group text or email. However, even these may not be possible for all agencies, depending on organizational policy. A conference call may be a simple way to have a quick conversation if members are too busy to meet in person. The best strategies for communication are usually the simplest, as it will help the sustainability of the process.

Finally, depending on the limits of information sharing mechanisms for each agency, the backbone support worker may take on a larger role in checking in with everyone to make sure that the work continues. It may mean one-on-one follow-up or pulling the team together.

Wrap-up & Date for Next Meeting

▷ **If there is a next meeting required, set the date, time, and location.**

▷ **Thank everyone for coming.**

A follow-up meeting may not be required for the group, depending on how long-term the goal is. If the work is longer term, then it is likely best and easiest to schedule a follow-up meeting while the group is in the room. If it is something that may not be necessary, then wait for the communication follow-up and the backbone support worker can have that conversation with the person receiving support to determine what makes the most sense.

Template 2.0

Consent Form - Service Coordination Agreement:

Key Questions:

What personal information is collected and shared and who will see it?

- With your consent, any appropriate information collected at intake and any updates related to the goals you identify today.
- Only authorized staff will see your personal information.

What if you change your mind about your personal information being shared?

- You can remove your consent at any time by speaking to any of the agency staff on this agreement.

Are there times when your personal information may be shared without your consent?
Your information may be shared without your consent if:

- A person under 18 years old has experienced or may be at-risk of abuse or harm.
- A person is a threat to themselves or another person.

I have read or have had read to me the information contained on this form and I understand it. **I consent** to the collection of my personal information necessary for me to achieve the goal I have agreed to.

The following agencies are included in this consent:

Agency:	Contact Person:	Signature:

❑ **(Optional) I wish to EXCLUDE the following agencies from receiving information**

____

Participant Signature: ____________________ **Witness:** ____________________

First and Last Name: ____________________ **Date Signed:** ____________________

Template 3.0 - Staff Only

Agenda for Service Coordination Meeting

Welcome & Introductions

▷ **Discussion of Job Descriptions**

- What agency is everyone from?
- What is each person's role in their agency?

Consent & Information Sharing

▷ **Consent forms need to have been signed prior to this meeting for it to take place.**

▷ **Who is the "backbone support" person moving forward?**

▷ **How will the group communicate with each other for major updates related to the goal?**

- Determine the easiest way to provide quick updates for everyone. It may be something as simple as a group text (which is why everyone's contact info is on the Service Coordination Template).
- Keep it as simple and sustainable as possible.

Exploring Individual's Goals

▷ **What is the major goal identified by the person (prior to this meeting)?**

- What are the sub-tasks needed to achieve this goal?

▷ **What resources can everyone bring to the group?**

- E.g. Some agencies may come with rent supplements. Another may come with culturally competent programming. Another agency may provide outreach capacity, etc.

▷ **Who can do what?**

- Assign a lead for each sub-task related to the goal.
- Consider:
  - → Agency mandate & available resources
  - → Job Descriptions
  - → Relationship with the person
  - → Is there duplication happening, or are resources better used coming from another agency?
    - ⟶ E.g. An Indigenous agency has rent supplement capacity and can provide culturally competent case management supports. Even though another involved agency can provide both of these, the agency cannot offer culturally competent supports to an Indigenous person. It makes sense for the mainstream agency to support the individual by stepping away.

Wrap-up & Date for Next Meeting

▷ **If there is a next meeting required, set the date, time, and location.**

▷ **Thank everyone for coming.**

Meeting Checklist

- ❑ **Does everyone involved have a clear role leaving the meeting?**
- ❑ **Is there a communication mechanism** (Group text, Email, etc.) to keep everyone up to date as developments related to the goal happen?
- ❑ **Does everyone have a clear consent form signed?**
- ❑ **Is the next check-in set up?**

Notes

Template 4.0

Service Coordination Agreement - Page 1 of 2

Name of Service User ______________________________

Lead Contact Worker ______________________________

Signature of Person Receiving Service: ______________________________

Agency	Worker Name	Phone	Email

Preferred Method of Communication for Key Updates to the Team: (Check which one)

❑ Group Text ❑ Email ❑ Conference Call ❑ Other (Please specify) ______________

Date & time of next team Check-in: (if needed): ______________________________

Location of Check-in: ______________________________

Template 4.0

Service Coordination Agreement - Page 2 of 2

Key Tasks	Lead Person

Checklist:

- ❑ Make sure everyone is clear about their role leaving the meeting.
- ❑ Ensure there is an assigned lead to coordinate future meetings.
- ❑ Confirm the method of communication (Group text, Email, etc.) to keep everyone up to date as developments happen.
- ❑ The date and time are set for the next check-in.

Signature of Person Receiving Service: ____________________

Witness: ____________________ **Date:** ____________________