

I. STAFFING AND ORGANIZATIONAL INFORMATION

A. Decision-making Process

Following the organizational chart listed in the Appendix, agency decision-making is participatory, as appropriate to the job description of each staff person.

Identified concerns should be brought to the attention of the supervisor. Problem-solving and direct communication with the parties in question is encouraged. If staff are unable to resolve the issue, the supervisor will intervene directly to assist in problem solving.

Confidentiality of clients and staff will be respected at all times.

B. Emergency Procedures

The Program Director and Assistant Director rotate the cell phone on a weekly basis. While carrying the cell phone, the staff person is responsible for first response in emergency situations identified by the Shelter Supervisors. In case of an emergency, shelter staff calls the person on duty after ensuring the safety of self and others (assess the situation to determine the potential danger to you and others, and then take steps to ensure safety). The staff person assesses the situation and determines the appropriate follow-up action(s).

Call the police at 911 if you need an immediate response (including medical emergencies). If necessary, staff receiving the emergency call should be prepared to visit the site to ensure that proper response is given. Staff should inform the Program Director of the situation if emergency response involves police, fire department, or emergency medical care. The staff person should complete an incident report and submit it to the Program Director before the end of the shift.

If a child is offsite (e.g., at school) and requires medical attention or needs to be sent home but the parent cannot be located, staff calls the emergency contact in the participants' file. If staff cannot reach the emergency contact, staff may take action to ensure the child's well being with the Program Director's consent.

If the Program Director is on vacation, or otherwise unavailable and additional assistance is needed, call or page the **identified Board Member** (see phone numbers in log).

C. Incident Reports

Incident reports should be written and submitted for the following:

- Police/Emergency Services intervention
- Accident/injury to anyone on the property or anyone conducting United Outreach business off-site
- Major rule violations of contract (violence or threats of violence, etc.)
- Stolen or damaged property; trespassers
- Negative neighborhood contact
- Altercation with Staff

- Child abuse and reports to Child Protective Services
- Significant instances of disturbing the peace
- Unusual incidents not covered by above

An incident report should be written by the staff person who observed or participated in the event and be submitted to the Program Director immediately. The Program Director shall fax a copy to the **identified Board Member** immediately. The Program Director is responsible for assuring that all staff members are aware of incident reports.

D. Daily Log Book

A logbook is maintained on a daily basis in the Grace Place office for staff communications. It should be reviewed and initialed by each staff person coming on duty. Any important information staff should be aware of needs to be included. If the issue is confidential, please refer directly to the Program Director. The Daily Log is not to be shared with Grace Place clients. The staff person on overnight duty is responsible for filling out the Log in each of its specific categories.

The logbook contains information and documents pertinent to: (1) clients currently residing at the program, (2) activity during the last month, and (3) emergency procedures. These documents include:

- Client Emergency Information Forms
- Daily Census
- Relief Staff Responsibilities
- United Outreach Staff List
- Daily Log Notes
- Sign-in Sheet
- Cell phone Schedule
- Emergency Procedures
- Current List of Follow-up Clients and Phone Numbers

As stated previously, the Shelter Supervisors document shelter activity each evening. Daytime staff should review these notes each morning to familiarize themselves with the events of the previous evening and initial the entry.

E. Staff Meetings and Supervision

Staff meetings are held each Wednesday, from 4:00 p.m. to 6:00 p.m. for the Program Director, the Assistant Director (otherwise known as this document as “case managers”) and the Shelter Supervisors at Grace Place. Case Conference for the Program Director and Assistant Director is held each Tuesday from 2:00 p.m. to 4:00 p.m. In addition, each staff member has one formal hour of supervision per week with the Program Director.

F. Support Committee

The United Outreach program site has a Support Committee consisting of representatives from the community. The Support Committee meets at least six times per year, serving as a link between the program and the surrounding community. Objectives of the committee are:

- To serve as liaison and to advocate with the broader community
- To secure donations to support the work of the Grace Place
- To volunteer or recruit volunteers in support of Grace Place
- To serve as a conduit of information about Grace Place and United Outreach

The chairperson of the committee will set the agenda, facilitate the meeting, and ensure that minutes are taken and distributed to members before the next meeting. The chair is nominated by the Program Director, with a 2/3 vote needed by the committee for approval. Membership is drawn from the following sectors of the community:

- Service providers and referring agencies
- Business representatives
- Religious organizations
- School and hospital representatives
- Former program participants
- Concerned citizens and neighbors
- City representatives
- Community police representative

The Program Director shall consult with the United Outreach Board before inviting new members to join the committee.

G. Coverage for Program Director

1. Coverage for More Than Two Days

After submitting a request for vacation time, the Program Director will designate a liaison, with the approval of the United Outreach Board. The **identified Board Member** is responsible for properly fulfilling the Program Director's duties. The **identified Board Member** works with the liaison to see that these duties are accomplished.

- General supervision of staff and program activities
- Convening and facilitating staff meetings and case conferences
- Scheduling intakes
- Facilitating community meetings/support groups
- Requesting checks from the Accountant and disbursing checks
- Depositing checks into client accounts
- Disbursing paychecks
- Collecting time sheets

2. Coverage for One to Two Days

If the Program Director is out of the office for up to two days, the Program Director will appoint a liaison, with the approval of the United Outreach Board. The liaison's sole responsibility during a short-term absence will be to act as a liaison with the Board Member. Refer all important decisions and issues to the Board Member.

3. Absences Less than One Day

No scheduling of intakes may be made while the Program Director is absent (unless the Program Director directed staff to set up the intake previous to the absence). Likewise, a decision to accept a new resident cannot be made in the Program Director's absence.

If an emergency arises, the staff must call the **Identified Board Member** after initially ensuring the safety of residents and staff.

H. Cooperation with Police

While the participant is in the program, the release of information signed at the intake authorizes staff to share appropriate information with police officers. You may inform an officer that a person in question does live at Grace Place Shelter and is in Room # ____. You may give relevant, factual information to an officer. If an officer seeks subjective information about a resident, refrain from sharing your opinions.

If the participant is no longer in the program, you may state this. If the officer asks for a current address our release of information is no longer valid. As a result, the officer will need a subpoena to access any information from the participant's file.

Refer any controversial situations to the Program Director, who will inform the **identified board member**.

Please note that this procedure means that the release of information needs to remain a "blanket" release (i.e., do not designate particular agencies at the top of the page). In order to cooperate with law enforcement, the release form must be a general release.

I. Confidentiality

The dignity and safety of our residents largely depends on how well we maintain confidential information. If shared improperly, information about mental and medical health, substance abuse, participants history, race, religion, citizenship, sexual orientation, and criminal record can be detrimental to an individual – public benefits, employment, health services, and housing can all potentially be lost if personal information is divulged to the wrong person.

As a starting point, the National Association of Social Workers' Code of Ethics provides these guidelines for confidentiality:

“Confidentiality and Privacy” – The social worker should respect the privacy of clients and hold in confidence all information obtained in the course of professional service.”

1. The social worker should share with others confidences revealed by clients, without their consent, only for compelling professional reasons.
2. The social worker should inform clients fully about the limits of confidentiality in a given situation, the purposes for which information is obtained, and how it may be used.
3. The social worker should afford clients reasonable access to any official social records concerning them.
4. When providing clients with access to records, the social worker should take due care to protect the confidences of others contained in those records.
5. The social worker should obtain informed consent of clients before taping, recording or permitting third party observation of their activities.

What types of information do confidentiality laws protect?

There are five main types of information that are protected by confidentiality laws:

1. **Criminal History.** Generally, this information is not accessible to service providers unless an arrest results in a conviction (Conviction records are public documents.) Service and housing providers can ask clients about criminal histories, although others, such as insurance companies, cannot under the law.
2. **Medical Information.** The Confidentiality of Medical Information Act prohibits disclosure of information regarding a patient by non-government agency health care providers with some exceptions.
3. **HIV/AIDS Records.** Therefore, since providers may not disclose HIV/AIDS information without client consent, with certain exceptions. In emergency situations, everyone should use universal precautions rather than trying to ascertain whether or not someone has AIDS.
4. **Public Benefits.** Records kept by a public officer in connection with public social services are confidential and can only be revealed for purposes directly connected to the administration of the program, such as doing research in order to improve the program.
5. **Financial Records.** The right to Financial Privacy Act restricts the ability of State agents or investigators to get financial records from financial institutions, with certain exceptions. It is unclear whether service providers that act as money managers are defined as financial institutions.

When can you disclose confidential information?

In general, do not disclose confidential information about a client’s physical or mental health, income level, criminal record, citizen-status, or enrollment in your program unless one or more of the following statements is true:

- The client specifically consents to the disclosure.

- The disclosure is necessary for the purpose of proper diagnosis or treatment of the client.
- A court of law has a valid order requiring you to disclose.
- The entity which is responsible for payment of the bill for services requires some information to verify that your client is participating in the program.
- The client is about to commit a crime against an identifiable victim, including self.
- There is suspicion of child abuse.
- Physicians are required to report AIDS cases to the local Health Department.

Note: This list of exceptions is not exhaustive nor is it applicable to all scenarios.

1. **Hearsay**

Information given to staff by clients regarding another client should be treated seriously and verified as appropriate. Care should be taken to protect the confidentiality of both parties. When information is presented, staff will inform the supervisor and a decision will be made to pursue the issue if the information relates to rule violations.

2. **Photos**

Residents have a right not to be photographed. Before photos are taken for United Outreach, have the resident complete a "Permission to Use Photos" form.

II. **ELIGIBILITY, REFERRALS AND CAPACITY**

A. **Emergency Shelter Eligibility**

To be **eligible** for United Outreach's emergency program, Grace Place, the applicant must meet these criteria:

1. The applicant is currently homeless according to the definition of the Department of Housing and Urban Development. To be homeless, the applicant must be a person who lacks fixed, regular and adequate nighttime shelter residence and:
 - A. Is sleeping in places not meant for human habitation such as cars, parks, sidewalks, and abandoned buildings;
 - B. Is in a supervised publicly or privately shelter designed to provide temporary living accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill);
 - C. from an institution that provides temporary residents for individuals intended to be institutionalized.
2. These categories include persons who ordinarily sleep in one of the above places but are spending a short time (30 consecutive days or less) in a hospital or other institution. Persons who are otherwise homeless include:

- A. persons being evicted within the week from private dwelling units, without identifying subsequent residences and lacking the resources and support networks needed to obtain access to housing (overcrowded and unsanitary conditions do not qualify as homelessness); or
 - B. persons being discharged within the week from institutions in which they have been residents for more than 30 consecutive days and no subsequent residences have been identified and they lack the resources and support networks needed to obtain access to housing.
3. High priority will be given to applicants currently residing in El Dorado County; and all applicants will need to establish a county connection (job, housing, school, and participants) within three days of acceptance into the program.
 4. The applicant is referred by a community agency that has participated in a United Outreach referral/orientation and has been formally accepted by United Outreach as a referral agency, has been referred by police, hospital, or other emergency-type facility.
 5. The applicant agrees to participate in the program and abide by all program rules.

United Outreach's emergency program, Grace Place, **is unable to accept:**

- Persons who are under the influence of drugs or alcohol and as a result of this use are unable to adequately care for themselves or their children
- Persons displaying behavior that is irrational, threatening, violent, or are otherwise dangerous to self or others
- Persons who falsify any information given to referral agencies or to United Outreach
- Persons who violate shelter rules prohibiting the use of drugs or alcohol on site, violence, possession of weapons, or sexual conduct
- Persons fleeing a domestic violence situation who are in need of a safe house (unpublished address).

B. Referral Process

1. Referral Agencies

Several community agencies refer homeless participants to Grace Place for emergency beds. They include:

- ABC
- DEF
- GHI
- JKL

To be eligible as a referral agency, referral agency staff must participate in an orientation that reviews the eligibility criteria and referral process.

2. Referral System

Referrals will be accepted by phone Monday through Friday 8:00 a.m. to 5:00 p.m. by Grace Place staff. The referring agency should call to ascertain what space is available in the shelter at

that time and be ready to proceed with the Intake Form. Upon completion of phone intake, if all eligibility criteria are met, the participants may arrive at Grace Place anytime up until 4:00 p.m. that same day. Upon completion of the referral call, the Intake Form should be faxed to Grace Place at (530)XXX-XXXX.

A waiting list will be maintained by the facility so that referring agencies are welcome to call in intakes if no space is currently available. We anticipate frequent turnover on at least a portion of our beds and hope our waiting list clients can be served quickly.

C. Emergency Shelter Capacity

1. Emergency Beds

Emergency beds are available on a day-to-day basis for El Dorado County homeless participants. Emergency beds are secured through the procedures outline above. Applicants must arrive at the shelter the same day they are screened and accepted. Participants can come prepared to move in by 4:00 p.m. Late arrivals (after 4:00 p.m.) because of late work schedules, etc. must have prior staff approval or be scheduled for the following day. Emergency intakes referred by a police department or other emergency-type facility will be accepted anytime.

Clients who occupy emergency beds will be given an opportunity to receive case management services from the Grace Place casework staff. Clients will work on a case management plan with staff during their first three days of stay. Length of stay for emergency shelter beds is from 1 to 60 days as is determined by progress on a case management plan, contract compliance, and adherence to shelter rules. This plan may include returning to permanent housing, or entering another designated program. Extensions to the length of stay will be considered on a case-by-case basis.

Clients will be asked to leave Grace Place after three days if they fail to establish a county connection or fail to develop a case plan with shelter staff. Clients who do not have a county connection will be referred to services in the appropriate county. Clients who do not develop a case plan may appeal their discharge to the Program Director and the **identified Board Member**. Clients who have been asked to leave for failure to develop a case plan will have to wait 30 days to reapply. Clients who have been asked to leave for major rule violations must also wait 30 days to reapply, but their past behavior will be taken into consideration before a decision is made regarding acceptance.

2. Overflow Operations

When emergency shelter beds are full and additional referrals are made to the shelter, or inquiries come in from the community, shelter staff will determine the appropriate response. Several alternatives may be utilized:

- Calling agencies from shelter referral lists in Sacramento and other counties to locate emergency shelter beds
- Arranging for and/or providing transportation
- Using motel vouchers, as available

- During inclement weather, staff will have one to two cots in the staff office that may be used at their discretion, with the approval of the Program Director, for one night only.
- During severe weather conditions, staff may allow up to three applicants to sit in the lounge area out of the weather in addition to using the emergency cots. This will need the approval of the Program Director.
- Maintaining a waiting list for eligible participants

III. GRACE PLACE INTAKE PROCESS

A. The Intake Interview – Phase 1

Intakes will be done the same day as the referral is received. At the time of intake, the shelter supervisor will assist in preparing a room for the participant while the Case Manager completes an Intake Agreement with them. Have him/her read and sign a copy of the rules and place in the file. Give a copy to the new resident. Inventory clothing and possessions, screening out contraband. Make resident aware of the communicable disease policy regarding lice inspection and use of appropriate disinfectant, which we will provide as necessary to prevent unsanitary infestation of the shelter. Show new resident(s) to the dorm area. Give combination or key to resident (for locking dresser). Make appointment with client for Emergency Assessment Meeting.

In addition, the Release of Information form must be signed at this time as well as completing the Emergency Medical Forms for the participants. Any medications should be taken from the participants for safe storage (have them sign a Medication Storage form) before they adjourn to their room. Ask the participant if there are any questions regarding the Intake Agreement, other forms or procedures. Verify identification, and copy available documents that substantiate homelessness, such as eviction notice or motel voucher, and that substantiate income. Set up a new file and include all documentation including both copies of the Emergency Referral Form, the Intake Agreement, the Release of Information Form, and any other relevant information.

Both the Case Manager and the shelter supervisor work together to orient the new participant in the following areas:

- Cover basic practical matters, such as mail, telephone usage, laundry, parking, etc.
- Review each page of the orientation packet
- Give client a copy of their signed Intake Agreement
- Set up a case-meeting schedule, including a meeting for the next day

B. The Assessment – Phase 2

During the first three days, the participants and staff decide on appropriate decisions regarding the case plan. If the participants' plan requires a lengthier stay (4 to 120 days), an assessment is done to assist in establishing appropriate case plan. The assessment packet also includes a budget, participant appeal process and non-discrimination policy and the requirements for TB screenings to be completed. The assessment should include an appraisal of the client's willingness to commit to a case plan, as well as the staff's observations. The cleaning deposit is

collected after a decision is made regarding the participants' progression into Phase 2 of their stay at Grace Place. Their continued stay is dependent on continual progress on their case plan and adherence to shelter rules.

C. Re-application Process

Clients will be asked to leave Grace Place after three days if they fail to establish a county connection or fail to develop a case plan with shelter staff. Clients who do not have a county connection will be referred to services in the appropriate county. Clients who do not develop a case plan may appeal their discharge to the Program Director and the **identified Board Member**. Clients who have been asked to leave for failure to develop a case plan will have to wait 30 days to reapply. Clients who have been asked to leave for major rule violations must also wait 30 days to reapply, but their past behavior will be taken into consideration before a decision is made regarding acceptance.

IV. CASEWORK MEETINGS

United Outreach uses a model of casework, the Task-Centered Approach, which provides a systematic, efficient form of treatment.

During Phase 2 of their stay, clients will meet with their Case Manager at least biweekly. After that time, case management meetings can be set once per week if the individual and the Case Manager so choose.

A. First Meeting after Assessment

At the first casework meeting after the assessment, the Case Manager takes the opportunity to "check in" with the client to see how he/she is settling into the program. This is also a good time to review the program guidelines and clarify procedures.

The savings program is also discussed in this meeting, although for clients in Phase 1 of their stay at Grace Place, it may not be the primary focus. The primary focus of the first three days at Grace Place is to stabilize the participants and acquaint them with the program and what it has to offer, and begin to work on a case plan. During Phase 2 (days 4 to 30 of client stay), a more thorough assessment will be completed including a review of their income sources and job history. Remember to make a copy of their check (AFDC, GA, employer) to keep in the file as income verification. Regular casework meetings in Phase 2 and Phase 3 will focus on the identified goals and tasks from the case plan worked out with the clients. Phase 4 may involve helping the client move to permanent housing or referring them to a transitional program, as appropriate.

B. Task-Centered Forms

Begin working on the *Initial Problem Specification and Casework Contract* at the first meeting after the assessment. The resident identifies the three main problems to work on. The problem

statement should reflect the participant's concern. The goal should be stated in relationship to the problem. The goal should be as specific and concrete as possible. If an outside source has mandated a response to the problem, that should be noted after "Who first identified the problem?" The baseline period is either one month or one week before this first meeting. This information should demonstrate specific behaviors. This baseline information provides the basis for comparison as the case management progresses. Under **Work with Others**, note the particular participants/friends, organizations, and agencies that can help solve the problem.

The *Task Review Schedule* is the heart of the task-centered approach, demonstrating the work of the participant and Case Manager to ameliorate the targeted problem. Note the target problem at the top of the form and write down the tasks. At each meeting write the date and rate the progress. Note progress and obstacles. An obstacle often suggests further tasks to help alleviate the problem.

The *Middle and Final Session* form helps the Case Manager track the problems. The status should be specific and should allow a comparison with the baseline measures. This form should be completed every month and at exit.

C. Weekly Sessions

Session 1 Orientation (described under move-in)

Ideally, a new client should have a casework meeting within 24 hours of arrival. Define the casework relationship and the role of each of you in this partnership. Review program guidelines. Set up regular weekly casework meetings. Determine that the client is acclimating successfully.

Session 2 Goal Setting

Develop goals with the client based on issues brought up at intake and first meeting. Include the two main goals of (1) stabilizing income and (2) securing permanent housing. Outline the plan, detailing who is responsible for each step. If the client has income, figure 50-70% of income as savings plan.

Session 3 Follow-through and Implementation

Review the casework plan and make changes if needed. Discuss progress made and barriers. If the client has an income, do another budget and calculate with him/her how much he/she will have to save in order to move out in three months. Get an idea of his/her housing plans and set a tentative move-out date.

Session 4 Through the end of their stay and Implementation

Review the casework plan; progress towards goals, make referrals when needed. Use contacts and other special interventions if the client does not seem to be progressing. Check on his/her savings periodically.

D. Housing Search

For clients who plan to move to permanent housing, discuss housing options, where he/she plans to look and how much he/she plans to spend. Who will he/she live with? Ask the client to fill out a “sample” housing application to be reviewed at next meeting. Discuss the housing application.

E. Housing Search Plan

The following questions guide the development of a housing search plan:

- Where are they planning to move?
- How much can they spend for housing?
- Will they look for an apartment or a house?
- Will they share a place or get one on their own?
- How will they handle a poor credit history?
- Can they get financial move-in assistance?
- Who will he/she use as references?

This is also a good time to bring up some of the anxious/ambivalent feelings clients may have as they approach their move-out date.

F. Progress Notes and Case Files

The Case Manager makes notes in the client file on the task-centered forms as soon as possible after each meeting. Notes on separate progress notes are optional. Note any communication with other agencies made on the client’s behalf. Entry notes should be concise, clear, and objective. Copies of all correspondence, check stubs, etc., are also kept in the client file.

All client files should be placed in the locked filing cabinet at the end of the workday to ensure that confidentiality is protected.

The *Program Participation Record* provides information on the client’s participation that will be necessary to record on this form. Contract violations and participation concerns should be noted on the backside.

Upon exit, complete the Exit Information Form and Program Sign-out Form.

When a client leaves, the Case Manager is responsible for completing all forms before submitting the file to the Program Director for final review. After each casework meeting, complete all progress notes in the client file. Keep notes brief. In addition, document any unusual events in the shelter that involve(d) the client. Initial your entries. Make sure that all required forms in the file have been completed, and that each is accompanied by any requisite documentation.

V. PROGRAM COMPONENTS

A. Job Development

Grace Place's Job Readiness program assists job-ready clients to secure employment. After the specialist does an initial assessment of the client's job skills and goals, the client is referred to the Job Readiness Program. The Specialist and Case Manager meet periodically with the client to review progress. The following services may be offered:

- Individual job counseling
- Job preparation workshops
- Referrals to job training programs
- Referrals to jobs
- Resume preparation

B. Savings Program

Each client who stays through Phase 2-4 is required to save 50 to 70% of his/her income towards first month's rent and deposit. Any other uses of the savings money must be discussed with the Case Manager before withdrawal.

Arrange a payment schedule for the savings program at the first casework meeting. Explain to the client that money will be accepted Monday through Friday in the office by a Case Manager. Explain the procedure for deposits and withdrawals (see Handling Money).

C. Meetings and Workshops

Life Skills Workshops and Support Groups house meetings occur weekly. All residents are required to attend. The workshop series is generally a twelve-to-sixteen-week rotation of community speakers who cover topics that will assist clients in strengthening their daily living skills. Topics include budgeting, job development, community resources, parenting, and other areas of interest to clients. One staff person arranges the schedule of speakers and attends the presentation.

Clients sign the attendance sheet; absentee names should be given to the Case Managers the following day. Excused absences include work, illness, or emergencies. Those with several unexcused absences may jeopardize their opportunity for an extension in the program.

The support group house meeting provides adults an opportunity to discuss common concerns related to homelessness, poverty, and transitional housing issues. The facilitator is responsible for introducing the topic and guiding the discussion.

The structure taught by Judith Rosenberg of the Support Group Training Project in late 1996 provides the structure for the support groups. As in the workshops, absences are noted and reported to the Case Managers. Each meeting should include:

- Announcements
- Leftover feelings from last meeting
- Checking in and signing up for group time

- Forming the agenda
- Individual and group work
- Wrapping up

Support Group

Wednesday, 7:00 – 8:00 p.m.

Staff is expected to take note of attendance at these meetings; names and general observations should be recorded in the log that evening.

Life Skills Workshop

Thursday, 7:00 – 8:00 p.m.

Series includes presentations by community speakers on such topics as legal assistance, housing discrimination, consumer credit issues, etc. These meetings take place in the dining room.

Staff and bilingual residents provide interpretation for Spanish-speaking residents.

VI. GRACE PLACE SHELTER GUIDELINES

A. Moving into the Program

New residents move in Monday through Friday before 5 p.m. A staff person will give the resident an orientation packet, a brief tour, and an in-depth orientation.

Some topics to be covered during the resident's orientation include a tour of the physical facilities, a discussion of the rules and policies in effect, assigning a dorm room and beds, issuing bedding, towels, and notions as necessary. Be sure the resident knows who his assigned Case Manager is. While you are conducting the tour, introduce the new resident to any current residents or staff you happen to meet.

If the applicant meets the criteria for acceptance, have him/her read and sign a copy of the rules and place in the file. Give copy to new resident. Inventory clothing and possessions, screening out contraband. Make resident aware of communicable disease policy regarding lice inspection and use of appropriate disinfectant, which we will provide as necessary to prevent unsanitary infestation of the shelter. Show new resident to bunk bed and locker. Give combination or key to resident lock to resident. Make appointment with client for Emergency Assessment Meeting.

During the first three days, the participants and staff decide on appropriate decisions regarding the case plan. If the participants' plan requires a lengthier stay (4 to 120 days), an assessment is done to assist in establishing appropriate case plans. During the participants' first three days, they should meet with the Case Manager daily and discuss these issues and make suitable plans.

The intake Case Manager should be sure the new resident's name is added to the census sheet in the log, also complete a short description of the new participants for the log (behind the census sheet). In addition, the special medical information form from the client's orientation packet should be filled out and placed in the log. Update the waiting list, emergency intake form, and completion log. Finally, complete the Census Form, but leave it in the case file since if the participants stays for Phase 2, a complete assessment will be completed and the form will then be updated and given to the Program Director.

B. Leaving the Program

When a participant leaves Grace Place he/she has either completed the program, was asked to leave due to rule violations, or it was mutually agreed upon between client and staff that the client should move-out to better serve his/her needs elsewhere. In any of these cases, it is necessary to have the client sign the Program Completion form in the file and give a forwarding address, if possible. If the client leaves unexpectedly, without informing staff, note this on the sign-out sheet in the file. Do the same if the client refuses to sign the form.

Discuss any follow-up plans and who the contact person will be. Add the exit data to the Completion Log. Complete the exit Census Form and give it to the Program Director. Submit the case file to the Program Director for final review.

When a participant moves out, he/she strips the bed, bringing the linen to the staff room. The blankets and bedspread should be washed, folded and placed with the pillow atop the bed. The client should then clean out the drawers and sweep under and around the bed.

Clients must take all of their personal belongings at the time of departure.

Savings money should be ready to be returned to the client upon departure. Ask the client to give 24 hours notice so that staff has the opportunity to withdraw the money from the bank in time. If a resident is unable to give 24-hour notice, he/she might have to wait until the following day to pick up the money.

C. Asked to Leave the Program

Participants may be asked to leave the program (hereinafter "ATL") if they violate the signed contract. The primary reasons for being ATL'd are:

- Use of drugs or alcohol on-site
- Threats or acts of violence
- Sexual misconduct
- Spending the night away from the program without permission
- Violations of the visitor policy
- Refusal to participate in the savings program
- Continued failure to follow-through with case plan

The Program Director may ask a participant to leave the program for other contract rule violations. The Program Director may decide to ATL a participant if there is a consistent or progressive lack of follow-through with program guidelines.

If a participant were ATL'd for violence, ask the participant to leave immediately. If clients refuse and mediation is unsuccessful, call the police for assistance. If the participant is being ATL'd for drug or alcohol use on-site, and is strongly under the influence of drugs or alcohol and not ambulatory, or mildly under the influence and calm, it may be acceptable to allow them to leave the program the next morning. However, do not allow the person to drive off the site while

intoxicated. If he/she insists on driving, call the police. Residents are not permitted to bring drug paraphernalia onto the property. If paraphernalia is found, test the residents for drug use immediately.

If a participant is ATL'd for any other reason, he/she may be give 24-48 hours to leave if in Phase 2 or 3 of the Grace Place Program. Emergency Shelter residents in Phase 1 and 1-12 hours in which to leave, depending on their infraction.

If a participant is ATL'd, use the standard procedure for returning of funds, checking the living area, and closing the file.

Drug/alcohol use, sexual misconduct, and threats or acts of violence are considered to be the most serious of all rule violations. Generally, any person participating in any of these three activities is asked to leave the building **immediately** and informed to call the next day to speak to their Case Manager or the Director regarding any unfinished business (e.g., money, possessions, referrals.).

The staff person on duty should consult with the Program Director before telling someone to leave the building, unless immediate action is necessary. The Case Manager and the Program Director make decisions about permanent dismissal from the program.

Note: If a client comes back to the Grace Place under the influence of drugs or alcohol, call the Staff person on cell phone duty immediately.

If it is an emergency (i.e., a client becomes belligerent and is acting in a threatening manner, pulls out a weapon, etc.) do not hesitate to contact policy by calling 911 (see Emergency Situations). Document incident in the log. Consult with the Program Director as situations arise, and do not leave Grace Place before completing an incident report.

Other contract violations are also seen as serious, but rarely does staff ask a client to leave Grace Place because of one contractual infraction. If the staff sees a progression of these violations, however, a group intervention is usually employed first to address the problem.

When violations of rules and regulations for Grace Place occur, the matter should be referred to the client's Case Manager or to the Program Director. Such violations are an indication that the client has failed to meet the terms of his/her signed contract.

D. Appeal Procedures

Participants who do not agree with a decision made by staff regarding denial into the program, termination, extensions, or consequences related to contract violations may appeal to the **identified board member**. Furthermore, complaints of discrimination and inappropriate staff conduct may be brought to the **identified board member** after the resident's presentation to the Program Director.

To appeal, the participant follows these procedures:

1. Within one working day of receiving the decision, the participant makes a written request for an appeal meeting with the Program Director and Case Manager. The Program Director then schedules the meeting within one working day of the receipt of the request. At the discretion of the Program Director, the participant may be asked to leave the program during the appeal process. After the meeting the Program Director decides whether to uphold the original decision within one working day and delivers the decision in writing.
2. To appeal further, the participant may request a meeting in writing with the **identified Board Member** within one working day of receiving the Program Director's decision. The **identified Board Member** schedules a meeting, which may take place by phone or in person, within one working day of receipt of the request. Following the meeting with the participant, the **identified Board Member** then investigates the appeal with the Program Director, Case Manager, and other relevant parties. The **identified Board Member** makes a final appeals decision within one working day of the meeting. The **identified Board Member** will give the final decision in writing. If the original termination decision is upheld, the participant must comply immediately with the decision.

E. Extensions

Extensions to the length of stay are considered on a case-by-case basis with a valid reason to consider extension. Extensions may be granted under the following circumstances:

- One or more paychecks are needed to move out
- An apartment/house has been secured but the landlord has set a later move-in date
- An emergency or crisis has come up which has prevented the client from seeking permanent housing or employment
- The appropriate amount of money has been saved to move out, but the client feels he/she needs to save more in order to have a more stable foundation to meet unexpected payments and still maintain a household.

Whenever an extension is requested the client must first initiate it. He/she should ask the Case Manager for an extension after he/she has been in the program for 6 weeks. If the client has been adhering to program guidelines, the Case Manager will accept the request and then consult with the Program Director and casework staff to decide if the extension will be granted.

Residents submit a request in writing approximately two weeks before the scheduled move-out date. A decision will be made within 4 working days of submitting the request. The Case Manager and Program Director will decide on an extension based on the following:

- Degree of participation in the program
- Additional amount of money needed to move-out, and the timeline for securing that amount
- Verification of one of the extension circumstances listed above

F. Drug and Alcohol Use

For clients who wish to move to Phase 2 -4 of the Grace Place program and have an identified addiction, their case plan will include addressing these issues since substance abuse is seen as a barrier to securing and maintaining permanent housing. For these clients, their case plan may include mandatory attendance at AA or NA meetings while waiting for a space to open at an appropriate treatment facility. A drug and alcohol counselor should verify additions. If an applicant arrives at the shelter under the influence of drugs or alcohol, then the applicant should be closely monitored for shelter rule compliance. Persons who are under the influence of drugs or alcohol and as a result of this use are unable to adequately care for themselves or their children will not be allowed to stay and will be referred Child Protective Services for an assessment of parental support.

Any participant who drinks alcoholic beverages or uses drugs while at the shelter facility will be asked to leave. However, do not allow the person to drive off the site while intoxicated. If he/she insists on driving, call the police. Residents are not permitted to bring drug paraphernalia onto the property. If paraphernalia is found, test the residents for drug use immediately.

G. Bus Tickets and Passes

1. Bus tickets are available on a limited basis for clients without an income who are conducting a job or housing search. Other uses, such as medical appointments, AFDC appointments, and care emergencies are also appropriate. The Case Manager authorizes the release of the tickets based on the participants' budget and need. Instruct participants to request bus tickets during the casework meetings only, unless an emergency arises. Check the Log for those eligible to receive them. Record the name of the client and the number of tickets he/she received in the Log. For documentation, the number on the ticket should be recorded in the Bus Ticket Log, along with the date, signature, and ticket use or purpose. Tickets and passes are kept locked up in the staff office.
2. Bus passes are distributed to eligible individuals on the first of the month by their Case Manager, based upon the job search goals. Bus passes will only be provided until the client gains employment. As soon as the client begins receiving an income, he/she will be expected to purchase bus passes. Staff will attempt to secure the assistance of a volunteer for transportation to medical appointments, job interviews, etc.

H. Chores

All residents are assigned chores at Grace Place. The chore roster is posted on one of the bulletin boards in the Grace Place dining room and a copy kept in the Staff Log. Chores are rotated periodically.

Evening chores should be completed by 8:00 p.m.; morning chores by 8:00 a.m. It is the responsibility of the Shelter Supervisors to monitor chore completion.

Record the appropriate information, particularly an individual's failure to complete an assigned chore, in the Log. Note that a resident bears ultimate responsibility for completion of an assigned chore, even after being written up in the Log for failure to complete that chore.

Occasionally, the residents will swap chores. Successful completion of the covered chore is the responsibility of the resident who was originally assigned the chore. If the staff person has any doubt, he/she should ask one of the Shelter Supervisors to determine who is responsible for a particular chore.

If a chore has not been completed within a reasonable time, and the resident assigned that chore is not on the premises, refer the problem to a Shelter Supervisor for action and completion of the chore.

I. Curfew

1. **Curfew Hours:** Curfew is 6:00 p.m. seven days a week. Clients should sign in daily between 4:00 and 6:00 p.m.
2. **Problems:** If a client does not sign in by curfew time, check to see if he/she is on the property. If they are not in, leave a curfew violation notice instructing the client to contact staff the following business day. If you suspect a medical or other emergency, please call the person on-call to consult about further steps.
3. **Recording:** Please record any problems with the curfew in the sign-in logbook.

Generally, clients are not allowed into the building after curfew unless they are returning from work or have advance permission from the Case Manager. If a resident arrives after curfew without a valid reason, let that client know that he/she must discuss this with the Case Manager as soon as possible and that it will be logged that he/she was late.

Always use discretion when opening the door to someone after curfew. If the situation appears to be unsafe (i.e., the person at the door is unknown, or the returning client is belligerent or intoxicated), do not feel compelled to open the door.

Record in the Log who has arrived before curfew and who hasn't. The front door to Grace Place should be locked and alarmed at 6:00 p.m. every evening.

Lights are turned out in the dorms at 10:00 p.m., in consideration of people who go to bed early.

J. First Aid

First aid medications and supplies are kept in the staff room closet of Grace Place. Staff is not permitted to dispense medications but can make certain items available to residents upon request. Serious injuries can be referred to the local hospital. Call 911 for serious situations.

K. Prescription Drugs

Several residents in Grace Place have one or more prescription drugs. Such drugs can be dangerous to those for whom they were not prescribed. All prescription medications should be kept in the staff office closet and give to clients upon request. An Rx log sheet is available in the log on which to record the drugs taken by clients and times made available.

L. Laundry

At orientation, the new resident will be told that quarters for the washer and dryer, and laundry detergent, may be provided if that resident has no source of income. When the resident gets a job, he/she will then be expected to furnish his/her own detergent and pay for use of the machines.

M. Meals

1. **Breakfast** Breakfast items such as cereal, coffee, donuts, etc., will be put out in the dining room beginning at 6:00 a.m.

2. **Lunch** Box lunches for residents can be prepared from food available in the facility.

3. **Dinner** Dinner is served from 5:30 p.m. to 6:30 p.m. every day.

Dinner is provided for everyone seven days a week. Residents who will not be back at Grace Place by dinnertime may sign up for a late arrival on the bulletin board in the dining room. The staff person on duty that day will prepare a dinner plate for each late arrival and place these dinners in the refrigerator.

N. Morning Staff Responsibilities

All residents who will be in the building after 9:00 a.m. are required to sign the stay-in log kept outside the office. If it is not filled out, wake the resident and have them sign the log. Residents lacking a suitable reason for staying in must be reported to their Case Manager, who will follow up with the resident to assess their situation. Clients who stay in must follow their established case plan.

O. Night Staff Responsibilities

The outside door needs to be locked by 6:00 p.m., seven days a week. For security reasons, the door can be locked earlier if the staff person on duty prefers. The door alarm should be turned on at 6:00 p.m. so that if anyone does try to leave the building, the staff person will know to re-lock the door.

P. Search Procedures

Clients missing a personal belonging and suspicious of another client having taken it may request a room search. These requests, however, do not necessarily have to be honored. The conditions for searching are as follows:

- Client needs to inform staff of missing object(s)
- Client needs to request a room search and staff needs to approve it
- All clients in the room(s) being searched are then notified that a **staff person** will be conducting a room search
- Clients whose rooms are being searched have the opportunity to be present during the search

If the missing object is found in another client's possession, the appropriate Case Manager will be notified and staff will decide the action to be taken. Searches, in general, are very rare and need to be considered thoroughly. Any Case Manager contemplating a room search, should at best, clear it through the Program Director first, and at least, discuss it with another Case Manager

United Outreach is not responsible for lost or stolen items.

Q. Telephone Use

There is one phone line, (530) xxx-xxxx, for client use at Grace Place for clients' business-related calls. This line is hooked up to an answering machine. In general, staff people do not answer this phone. However, staff takes messages off the machine as soon as possible and leaves them in clients' mailboxes. Clients may use this phone until 9:00 p.m. and again after 7:00 a.m. Staff persons are encouraged to monitor use of this phone to prevent abuse. Any personal call must be made on the outside pay phone, and only until curfew hours. However, clients may receive personal messages on the answering machine.

R. Visitors

Visitors are not permitted in Grace Place. Clients who wish to visit may do so offsite.

S. Children's Program

The children's room is staffed with volunteers on a varied time schedule that is kept in the office. During other hours, one or two participants at a time may use the room under the supervision of a parent. Parents are expected to clean up after their children and before leaving the playroom. Shelter Supervisors should monitor and encourage playroom use.

1. Children are encouraged to participate in the activities offered while following the guidelines outlined below:

- a. The program is available for children residing at Grace Place who are **3 years old and up**.
 - b. At least one parent from each family must be on-site while any children from that family are in the playroom.
 - c. A parent must accompany each child to the playroom. Children 12 years old or older may be unaccompanied, however when a volunteer is available.
 - d. When a parent brings a child to the room, he/she must sign the child in the parent sign-in/out form.
 - e. Upon completion of the day's activities, a parent must sign his/her child out of the room.
 - f. At the end of each volunteer shift, one of the volunteers should bring the Parent Sign-in/out Form to staff and report how things went.
2. The following procedures are intended for both staff and volunteers working in the playroom during evening child care:
 - A. Make sure the room is clean and that craft activities and evening snacks have been set aside.
 - b. Before child care formally begins, plan activities briefly with the volunteers. Read reference article on planning child care activities. Volunteers should engage in age-appropriate activities with the children and should remind them, when appropriate, of child care rules. (See rules sheet)
 - c. A record should be kept of children who attend each child care session and filed chronologically in the Child Care Handbook Binder (see child sign-in form).
 - d. At least 10-15 minutes should be spent cleaning the child care room. Only after the room has been satisfactorily cleaned should the snacks be given to the children.
 - e. At 7:30 p.m. staff should "check in" with the volunteers to discuss the child care session.

Each child care volunteer needs to sign in and record the amount of time he/she volunteers in the Volunteer Log Book. On each volunteer time sheet, dates and times should be carefully noted. Important statistics on volunteerism will be compiled based on this information.

T. Emergency Procedures – Children

If a child is off-site (e.g., school) and requires medical attention or needs to be sent home but the parent(s) cannot be located, staff calls the emergency contact in the participants' file. If the emergency contact cannot be reached, staff may take action to ensure the child's well-being, with the consent of the Program Director. However, participants are encouraged to assist one another with these special circumstances.

In an emergency, REMAIN CALM AND STAY IN CONTROL!

1. If a child is physically injured, one volunteer should immediately get the parent and then find a staff member. The other volunteer(s) should remain with the child and calm the other children. For minor injuries, properly use the first-aid kit.
2. In case of fire, quickly and calmly gather the children and follow the fire safety plan located by the main door.

U. Babysitting

United Outreach allows baby-sitting between participants in Phase 2-4 of their stay only with prior staff approval.

Children under the age of 12 left unattended may be referred to Child Protective Services. Staff members are not responsible for baby-sitting unattended children.

Residents are not allowed to baby-sit children who do not reside in the program.

With the Case Manager's approval, teenagers 16 years old or older may baby-sit for younger siblings.

V. Entering Dorm Areas

Staff may enter dorm areas under the following circumstances:

- Repairs, regular maintenance, and safety inspections
- Reasonable suspicion of drug or alcohol on the premises
- Reasonable suspicion of stolen property on the premises
- Emergency such as fire, domestic violence, or other injury has occurred
- The Case Management meeting occurs in the dorm area
- Mail delivery
- Routine room checks
- To access storage
- Management of applicable rules and regulations, or for any other lawful purpose

If there is a need to enter a dorm area when the resident is not there, staff must be accompanied by another staff person. This does not include repairs or maintenance work.

Whenever possible (i.e., when not an emergency situation), notify the participant(s) in advance that staff will be entering the dorm area and provide the reason.

W. Referrals to Child Protective Services

This section is adapted from *Working with Participants in Shelters: A Practical Guide for Counselors and Childcare Staff*.

1. Child Abuse and Neglect Reporting Law

The following situations are reportable conditions:

- Physical abuse
- Sexual abuse
- Child exploitation, child pornography, and child prostitution
- Neglect
- Extreme corporal punishment resulting in injury

- Willful cruelty or unjustifiable punishment

The following individuals are legally mandated reporters:

- Child care custodians
- Health practitioners
- Commercial film or photographic print processors in specified instances
- Child Protective Agencies

2. When to Report

A telephone report must be made immediately when the reporter observes a child in his/her professional capacity or within the scope of his/her employment and has knowledge of, or has reasonable suspicion, that the child has been abused.

3. To whom do you Report

You have a choice of reporting to the Police or Sheriff's Department or to the Probation Department or Child Welfare Agency. Each County has preferred reporting procedures.

4. Individual Responsibility

Any individual who is named in the reporting law must report abuse. If the individual confers with a superior and a decision is made that the superior file the report, one report is sufficient. However, if the superior disagrees, the individual with the original suspicion must report.

5. Anonymous Reporting

Mandated reporters are required to give their names. Non-mandated reporters may report anonymously. Child protective agencies are required to keep the mandated reporter's name confidential, unless the court orders the information disclosed.

6. Immunity

Any legally mandated reporter has immunity when making a report. In the event a civil suit is filed against the reporter, reimbursement for fees incurred in the suit will occur up to \$50,000. No individual can be dismissed, disciplined or harassed for making a report of suspected child abuse.

7. Liability

Legally mandated reporters can be criminally liable for failing to report suspected abuse. The penalty for this misdemeanor is up to six months in County jail, a fine of not more than \$1,000 or both. Mandated reporters can also be civilly liable for failure to report.

8. Notification Regarding Abuse

You are not legally required to notify the parent(s) that you are making a report; however, it is often beneficial to let the parents know you are reporting for benefit of a future relationship.

VII. OFFICE PROCEDURES AND STAFF GUIDELINES

A. Handling Money

1. Client Accounts

The Program Director and Assistant Director can only handle client deposits and withdrawals.

a. Deposits

- (1) Have the client fill out the client account log. Take the money (cash or money order) from the client and count it.
- (2) Fill out the deposit slip and make two copies of it – one for the client's file and one to give the Program Director with the money. Give the original slip to the client and have them check to see if the deposit amount is correct.
- (3) Give the money and the copy of the slip to the Program Director who then counts the money again.
- (4) Record the deposit in the client's file (Program Participation Record).
- (5) Program Director makes deposits at the Bank within 24 hours.
- (6) Program Director faxes the bank deposit slip, with client information written on the slip, to the Grace Place Accountant.
- (7) Program Director files a copy of the bank slip in the "Current Client Account" file until end-of-month reconciliation. Program Director turns in original bank deposit slips to the Grace Place Accountant.

b. Withdrawals

- (1) The Case Manager confirms amount client has in savings by comparing the balance in their file with the last balance obtained from the Grace Place Accountant. If there is a discrepancy, this needs to be cleared up with the Accountant.
- (2) Clients may request withdrawal of funds through their Case Manager with at least 48 hours notice. The request slip must be completed with their Case Manager, who then faxes the request slip to the Grace Place Accountant. Clients sign this form to verify amount requested, as well as to verify the form (cash or check) in which they want to receive funds.
- (3) Case Manager faxes the request slip to the Accountant and confirms the time the funds will be picked up. The Case Manager gives it to the client. The client signs the receipt form, a copy goes into the client's file and the original is given to the Program Director along with the original request slip. The Program Director files both in the "Current Client Account" file until the end-of-month reconciliation.
- (4) Clients may receive their funds in the form of a check made out to them, to a third party, or in cash. Clients must sign a request form.
- (5) Client money that is kept overnight in Grace Place is deposited in special lock boxes. These are used for residents to lock up cash (or other small valuables) overnight if requested.

2. **Cleaning Deposits**

When a client moves to Phase 2 -4 of the Grace Place program, he/she is required to pay a \$50 cleaning deposit to ensure that he/she will leave their space clean and damage free. When the client exits the program, if he/she has **not** cleaned their space, has damaged the property in any way, or not returned Grace Place property (linens, etc.), \$50 will be deducted from their savings account and remitted to Grace Place.

3. **Petty Cash**

This fund is only administered by the Program Director. It is kept in the locked cash box in the staff office. Requests for funds should be made to the Director. Receipts must be attached to the Petty Cash Receipt form and reimbursement will not be made to staff without it. The exception to this is for house and resident laundry quarters. There will be a separate log for recording laundry money. Numbered receipts in the Purchase Order folder **should be completed** for each transaction at the time of the transaction.

4. **Fundraising**

The majority of fundraising for United Outreach is conducted through the Board of Directors of this agency. However, all staff play a role in representing the agency to potential donors. Inform the Program Director of any groups or individuals that are interested in contributing to the agency. The **identified Board Member** is then contacted by the Program Director to determine the type of donation (monetary, in-kind, material goods, etc.) to be solicited. In general, donors are asked to contribute to the general operation of United Outreach, rather than to a particular program. Exceptions to this procedure must be cleared with the **identified Board Member**.

When monetary donations are received, they must be endorsed immediately ("For Deposit Only United Outreach") and submitted to the Accountant within 24 hours. The procedure for thank-you notes and documentation should be followed (see Donations).

B. Staff Documentation

1. **Timesheets**

Timesheets are completed, signed and dated by employee, showing actual time worked and any leave taken. Timesheets are collected and signed by the Program Director on the day after the pay period ends, generally Monday. The cover sheet is attached and submitted to the Accountant by 12:00 p.m. noon, the day after the pay period ends. Requests for leave must be approved in writing by the Program Director (use form), preferably 2 weeks before the leave date, and then submitted to the Accountant.

3. **Statistics and Reporting**

The Program Director has primary responsibility for statistical reports. Each Case Manager, however, must be sure to complete reports on their caseload. United Outreach statistics are due to the **identified Board Member** by the 5th of each month. Quarterly statistics are due in April, July, October, and December. Yearly statistics are due in January. Other reports are due periodically to various funding sources. See the **Identified Board Member** for reporting calendar.

C. Staff Conduct

1. Addressing Concerns

Staff are expected to use the personnel policy procedures to address work-related concerns.

2. Phone Use

Office phones are for business-related calls only. Personal calls that are made beyond the toll area must be charged to the staff person not to the agency.

D. Donations

All donations should be delivered to the Director for proper inventory. If this is not possible, obtain a list of items donated and the donor's name and address. Put this information on a Donation Log Form in the Donation Log binder. Leave a note in the log describing where the donations have been stored. There is also a "Wish List" flyer on file listing items that are needed at Grace Place. Any staff member may give these forms out to prospective donors. A copy of the donation log is forwarded to Development weekly.

