



NORTHWEST MICHIGAN
COALITION
TO END
HOMELESSNESS

**Northwest Michigan Coalition to End Homelessness
Warm Transfer Process**

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Warm Transfer Basics

When transitioning from homelessness to permanent housing, people have a greater chance for long-term housing stability when a warm transfer is completed. The values of the Northwest Michigan Coalition to End homelessness inform the warm transfer process through collaboration, accountability and data-driven decision making. The warm transfer is a collaboration between the street outreach worker, the housing-based case manager, and the client. Each is accountable to conduct a person-centered review of the client's identified goals for housing stability. This collaborative process gives the clients the opportunity to provide clarification, ask questions, and learn more about services offered in housing. The goal of the warm transfer is for all three parties to have a clear understanding of how services will continue once the client is housed. Data gathered through the full SPDAT assessment informs areas of need, that should the client identify, are to be focused on once the client is housed. Ho

For the warm transfer process to be effective for the staff and most importantly for the people we have the privilege of serving, we must assume our colleagues are doing their jobs and we trust each other enough to continually communicate throughout the process. Remember, this does not have to be completed in one meeting. Sometimes, the warm-transfer is completed over the course of 2 meetings, and some steps, like the SPDAT review can be completed once the client is housed.

Warm Transfer Steps

1. **Introduction:** Introduce all staff that may be working with the client. Introduce the client to any new staff they may be meeting for the first time. Make sure to explain each other's roles and programs each staff person represents (ex. housing-based case manager, this person will be helping you in housing).
2. **Exchange File:** Information given to the case management staff will be used to help the participant develop a plan for long-term housing stability. This should happen electronically and will require communication between the outreach and housing-based case management staff to ensure ROI completeness and visibility within HMIS. **This is done prior to the warm transfer meeting** (with the appropriate releases of information in place) so that the housing-based case manager can ask questions, ensure all documents are uploaded per program requirements, and can take notes of anything they would like to discuss during the initial meeting.
3. **Explanation:** Explain the housing program and review the participant agreement. This provides the opportunity for potential participants to ask questions and gives the opportunity for the housing-based case management staff to provide clarification or more details about the housing program.
4. **Review Housing Plan:** Complete the Housing Search Checklist with the client. A copy should be provided to the client and anyone who is helping with the housing search (ex. Street Outreach and the HBCM) Street Outreach workers should also provide the Housing inventory Checklist they have competed with the client. ***applicable only if the housing program is scattered site, and does not come with an already identified unit.*
5. **Summary:** Document the warm transfer with a summary and place it in the client file.
6. **Transfer Checklist**
7. **SPDAT Review:** Street Outreach provides a detailed walk-through of the results for each SPDAT component. This gives the participant the opportunity to provide more information or clarification for any component. This also provides the case management staff the opportunity to ask questions for clarification. Another helpful tool to review during this stage is the Housing

and Case Management form if utilized by Street outreach. This can be done in housing after the client has moved in. A great deal of prep work must be done by the outreach worker to help the client understand that review of their goals in housing through the SPDAT is critical for long-term housing stability. Coaching and prompting can take place during the SPDAT review as the review should not be treated as a clinical and rigid process. This is a time for the client to lead the discussion and help the Housing Based Case Manager understand their strengths and abilities as related to their housing goals indicated on the SPDAT.

8. **Set the Next Meeting:** A time is set for the housing-based case manager to have the next meeting with the client. The client receives a reminder card of the appointment date, time, and location, along with contact information for the housing-based case manager. Support at this stage is critical for the participant depending on acuity and needs. The work of establishing long term housing stability is building on the foundation you created during engagement.

Warm Transfer Checklist

Documents to be uploaded or recorded in HMIS by Outreach staff prior to housing program enrollment to determine eligibility	
	ID
	HMIS ROI
	Verification of Homelessness (VOH)
	Last 30 days of income *only for ESG RRH
	Full SPDAT
	Verification of Disability *NMSH only
	Verification of Chronicity *if applicable
	Verification of Veteran Status *if applicable
Warm Transfer discussions	
	Program participant agreement (led by HBCM)
	Full SPDAT review (led by Street Outreach)
	Shared housing discussion (if applicable per program type—led by HBCM)
	Communication expectations
	Contact information and local areas the client can be found if phone is not feasible
	Housing search and identification. Complete Housing Search Checklist.
	Clarifying and discussing our continued supportive roles within the clients (outreach vs HBCM during housing search)

Roles and Responsibilities

Roles and Responsibilities of Street Outreach and Housing Based Case Managers During Housing Search and Identification	
Street Outreach	Housing Based Case Managers
<ul style="list-style-type: none"> ▪ Basic needs: <ul style="list-style-type: none"> • Shelter entry • Food • Clothing • Physical health • Mental health • Transportation • Benefit management ▪ Housing Search and Identification (see right)* ▪ Provide GW store voucher for move in supplies ▪ Engagement support to help build rapport with HBCM 	<ul style="list-style-type: none"> ▪ Housing Search and Identification: * <ul style="list-style-type: none"> • Housing search • Contacting landlords for availability • Help filling out housing applications • Coordinate funding for rent application fees and sec. deposit etc. ▪ Coordinate apartment showings with client (provide transportation if needed) ▪ Contact with landlords to provide info. on program ▪ Lease signing ▪ Move in basket ▪ Obtaining move in supplies and furniture

Client Centered Team Collaboration

During the pre-tenancy phase, outreach staff, housing-based case managers and other identified support staff will remain in close communication regarding the client's case. Such communication could include but is not limited to: Street Outreach keeping HBCM informed of changes (household size, jail, location, etc.) and HBCM keeping Street Outreach informed of changes (unit identification, person becoming housed etc.)

The engagement process might take longer between HBCM and the client (ex. pre-tenancy work was short or stunted in some way) progressive engagement will continue along with the Street Outreach worker (when appropriate) and this collaboration and communication will continue until engagement is solidified in housing.

Remember that this work takes constant collaboration and communication. Act as if the Street Outreach worker or the Housing Based Case Manager is sharing an office with you. You are all on the same team, working for the same cause...**to make homelessness rare, brief, and one-time.**

Housing Search Checklist

Housing Search Checklist	
<i>This document should be shared with the client and all support workers assisting in the housing search.</i>	
How much income is available for rent? (This may require projecting income and developing a tentative monthly budget. <u>Unless the housing is subsidized or shared, rent will almost certainly be more than 50% of income</u>)	
Who will live in the housing?	
What is the minimum number of bedrooms needed?	
Should the housing allow pets? What about a service/emotional support animal? Do you have documentation for a service or emotional support animal?	
Has the client applied to housing locally? (Check in on waitlists if yes)	
Are there safety concerns that limit housing options?	
Should housing be close to specific supports? (family, faith community, friends, child care, children's school, employment, bus line, health care provider)	
What means of transportation will the client be using and how does this affect the housing search?	
Is shared housing an option?	
What is the Fair Market Rent for the bedroom size?	
Do utilities need to be included in the rent? (if not covered by the program)	
What housing program is the client enrolled in?	
Contact info for Housing Based Case Manager who will be explaining the program to landlords:	
HCV Status (Do they have a voucher? Are they on the waiting list etc.)	
Accessibility issues (do they need accommodations like wheelchair accessibility, healthcare equipment etc.)	
Are there active or past criminal records that could affect housing per landlord background checks?	