

March 2023

LEARNING LAB: POLICIES AND PROCEDURES WORKSHOP PART 2

Welcome!

Introductions

- Facilitation Team
- Your Name
- Your County or Tribal Community
- CDSS Program



Learning Lab Goals



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- Identify solutions and provide tools to overcome roadblocks in the Policies and Procedures development process.
- Introduce tools that will expedite your development process.
- Outline implementation logistics for successful rollout of new or revised Policies and Procedures.

Today's Session Overview

- ✓ Welcome
- ✓ Learning Lab Goals
- ✓ Feb Learning Lab Overview
- ✓ Policies Vs. Procedures
- ✓ Policies and Procedures Checklist
- ✓ Policies and Procedures Tool
- ✓ Applying the Tools
- ✓ Policies and Procedures Best Practices
- ✓ Questions and Reflections



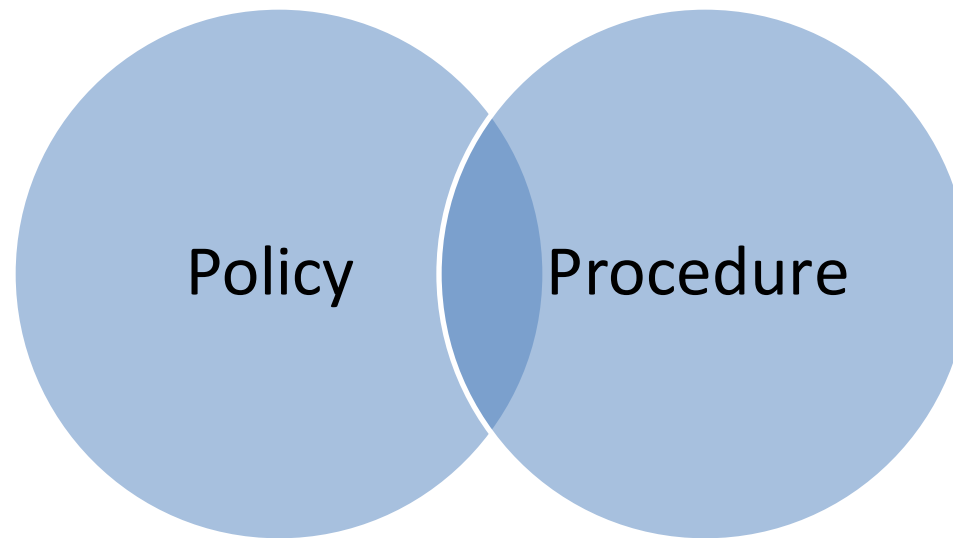
Today's Presenters

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POLICIES AND PROCEDURES

Policies Vs. Procedures

- Specifies or prohibits conduct.
- Enhances the program mission.
- Statement of standards or rules
- Guidelines for procedures (Not a 1:1 relationship)



- Step-by-step instructions on how to complete certain tasks.
- Reflect the rules in the policies.
- Provides the details for individual processes.

Policies and Procedures Components



P & P Checklist and Draft Document

A	B	C	D
	Policies and Procedures (P &P) Sections	P & P Already Developed?	Annual Update Completed?
Program Overview			
	Program Overview	No	No
	Program Design	Yes	No
	Key Roles	No	No
	County/Tribal Agency	Yes	Yes
	Contracted Service Provider(s)		
Intake			

Discussion of Checklist

- Does anyone have policies and procedures that work well?
- Does anyone have a P & P in development?
- What are the pain points with writing your P & P?



Writing the Policy

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Housing Program Policies and Procedures Template

Purpose: An effective housing program has policies and procedures that reflect key program decisions about eligible expenses, staff processes, and program approach. This document is meant to be an internal guide and provide clarity about how the program will operate. Clear, accurate policies and procedures allow for all key players in the program to work together as a team with a shared understanding of the program. If a county or tribal agency is working with a local provider to implement the program, this document should be created with their input and shared with the provider staff.

How to Use: As counties and tribal agencies make key decisions about their housing programs, they should use the Housing Program Policies and Procedures Template to record these decisions and create a written record for the program. Each section provides suggested language that can be included in the policies and procedures along with key decision points that counties and tribes need to make about their program. Please note that the suggested language is not complete and needs to be reviewed and edited to be accurate. The intention is that by going through each section, addressing the key decisions, and recording decisions in writing, counties and tribes will have an initial draft of their program policies and procedures.

If a county or tribe is contracting with a 3rd party to implement the program, the county or tribe should solicit some of the information for the policies and procedures through a work plan submitted by the 3rd party. This is especially true for granular processes that the 3rd party will oversee.

This template document was created by the Change Well Project for use by CDSS-funded housing programs and partner agencies. A program using this template should review and make changes based on their specific program criteria. This may include any required approval processes for use by your county or agency. More information about our work is at www.changewellproject.com. This template document may be altered, changed, and reused by CDSS-funded housing programs and partner agencies with no required attribution to Change Well Project.

- Table of Contents is Reference
- Use each section as needed
- Use exact language or change as needed
- Use prompts for inspiration

P & P Example: Intake Process



Ensure program participants know the process and all steps involved

- Process is transparent for all parties
- Screening In, not Out
- Process offers accommodation for accessibility
- Minimal steps or barriers

Intake Policy Writing Workshop

Sample Language from P & P Template

Program Intake and Enrollment

This section should provide a narrative overview of the program's intake and enrollment process. We recommend including an image of a process map to provide a visual along with the narrative. The sections should include how households will be referred to the program, the program will outreach to find eligible households, the program confirms eligibility, and the household will be enrolled in the program. For each step of the process, the section should include the required documentation and what staff are responsible. |

Intake Policy Writing Workshop

Writing Prompts from P & P Template

Key Decision Points to Include

- Will the intake and enrollment process include the county/tribal agency and the local provider? How will the transfer of information happen between parties?
- Will your program include time requirements for how quickly a household will be followed up with after referral, eligibility confirmation, and/or intake?
- Include the county/tribe process map for program intake and enrollment in this section that provides an overview of the process.
- We recommend that programs have participants sign an authorization to share information at intake that enables the program to easily share information with local partners who are also providing on going supports to the participant.

Intake Discussion

- What elements need to go into an Intake Policy?
- Share examples of Policies that are working well.
- Questions for the group?



Policies and Procedures Best Practices

Considerations for P & P Development

- Who reviews, edits?
- Establish a timeline for the process that accounts for any approvals needed and helps keep things moving
- Where will it be stored and who will have access?



Policies and Procedures Best Practices

Annual Updates and Reference

- Don't let it die on the drive!
- Make sure you have a communication plan to orient stakeholders to the revised PnP
 - County Staff
 - Impacted providers
 - Etc.
- Annual Review and Update Process



Questions?



Resources & Links

Resource	Link
Policies and Procedures Checklist	https://www.changewellproject.com/files/ugd/cfb8fc_8d165e18c03d444c9064061132c5577d.xlsx?dn=Policies%20and%20Procedures%20Checklist%20.xlsx
Policies and Procedures Tool	NEED LINK
Request for TA with Change Well	REQUEST TECHNICAL ASSISTANCE Change Well Project
Change Well Project Resources	Resources Change Well Project

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